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ABSTRACT

This loose-leaf manual provides the detailed rules, guidelines, and examples to be used by the components of the Educational Resources Information Center (ERIC) Network in acquiring and selecting documents and in processing them (i.e., cataloging, indexing, abstracting) for input to the ERIC computer system and subsequent announcement in "Resources in Education" (RIE) and "Current Index to Journals in Education" (CIJE). The 16 sections of the manual are entitled: (1) Introduction (an overview of the ERIC system); (2) Acquisitions (procedures used to acquire documents and journal articles); (3) Selection (evaluation criteria for choosing material for the database; (4) Handling and Shipping (Clearinghouse and ERIC Facility practices concerning the preparation and movement of documents between these two components); (5) Cataloging (preparation of the bibliographic data); (6) Abstracting/Annotating (guidelines for writing and editing abstracts and annotations); (7) Indexing (assignment of ERIC Descriptors and Identifiers); (8, Part 1) Vocabulary Development and Maintenance--Descriptors (procedures for maintaining the "Thesaurus of ERIC Descriptors"; (8, Part 2) Vocabulary Development and Maintenance--Identifiers (procedures for maintaining the "Identifier Authority List"; (9) Data Entry (procedures for data preparation for RIE, CIJE, and full-text ERIC Digests); and (10) Database Changes (Post-Publication). Three appendixes are also included: (A) ERIC Clearinghouse Scope of Interest Guide (131-page detailed discussion of each Clearinghouse's scope, along with relevant indexing terms); (B) Document Preparation (for Filming); and (C) ERIC Indexing Handbook (Clearinghouse Indexing Practices) (120-page discussion of individual Clearinghouse indexing practices). A Glossary of Terms (with Acronym List) and an overall index to the complete manual (augmenting the individual section indexes) are also included. This manual will be of interest to all organizations that use the ERIC database. (CRW)

ED348055

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

IR054276

ERIC PROCESSING MANUAL (EPM)

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SECTION	CHAPTER NAME	PUBLICATION DATE	PRICE
Section 1	Introduction	February 1992	$7.50
Section 2	Acquisitions	June 1992	$7.50
Section 3	Selection	August 1991	$7.50
Section 4	Handling and Shipping	June 1992	$7.50
Section 5	Cataloging	June 1992	$7.50
Section 6	Abstracting/Annotating	June 1992	$7.50
Section 7	Indexing	June 1992	$7.50
Section 8	Vocabulary Development and Maintenance	June 1992	$7.50
	Part 1: Descriptors	June 1992	$7.50
	Part 2: Identifiers	June 1992	$7.50
Section 9	Data Entry	June 1992	$7.50
Section 10	Database Changes (Post Publication)	June 1992	$7.50
Appendix A	ERIC Clearinghouse Scope of Interest Guide	April 1991	$7.50
Appendix B	Document Preparation (For Filming)	June 1992	$7.50
Appendix C	ERIC Indexing Handbook (Clearinghouse Indexing Practices)	June 1992	$7.50
Glossary	Glossary of Terms (With Acronym List)	June 1992	$7.50
Index	Index	September 1992	Not sold separately

* The price for the entire EPM is $75. The EPM has been announced in RIE. The entire document is ED-xxx xxx (Level 1). Selected major sections have been separately analyzed (ED-xxx xxx through ED xxx xxx).

August 1992

ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Section I: Introduction

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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PREFACE

ERIC SYSTEM OF MANUALS

The following manuals govern ERIC's policies and procedures:

I. **Policy and Administrative Procedures Manuals**

  A. *ERIC Policy Manual*
  B. *Administrative Procedures and Guidelines for ERIC Clearinghouse Management*

II. **Operations Manuals**

  A. *ERIC Processing Manual* (EPM)
  B. *User Services and Reference Manual*
  C. *Publication/Product Preparation Manual* (Projected)

The *ERIC Processing Manual* is the operations manual concerned with bibliographic database building.

ORGANIZATION OF EPM

The *ERIC Processing Manual* (EPM) is organized into ten (10) major Sections, each dealing with a major functional work area in the development of the ERIC bibliographic database. Each is designed as an independent module that contains all that is necessary to perform the function involved. Each has its own subject index.

There are three supporting appendices: one providing subject scope statements for each ERIC Clearinghouse (to be used in assigning documents to Clearinghouses and transferring documents between Clearinghouses); one providing guidance for the physical preparation of documents for microfilming; and one detailing each Clearinghouse's special indexing practices. In addition, there is an extensive glossary (and acronym list) providing definitions for various technical terms used throughout the ERIC manuals. A comprehensive subject index provides easy access to the content of all Sections.

SECTION	TITLE [Content]	NUMBER OF PAGES
I	Introduction [An Overview of ERIC]	27
II	Acquisitions [Acquiring Documents/Articles for ERIC]	56
III	Selection [Selecting Documents/Journals to be Processed]	40
IV	Handling and Shipping [Marking, Logging, Mailing Input]	42
V	Cataloging [Creating Descriptive Citations]	212
VI	Abstracting/Annotating [Writing Brief Narratives of Content]	38
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		Subtotal 787
Appendix A	ERIC Clearinghouse Scope of Interest Guide	144
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Appendix C	ERIC Indexing Handbook (Clearinghouse Indexing Practices)	137
		Subtotal 301
	Glossary of Terms (and Acronym List)	35
	Index	
		Total 1,123

AUDIENCE FOR EPM

The *ERIC Processing Manual* (EPM) is intended primarily for the use of the ERIC Clearinghouses and adjunct ERIC Clearinghouses engaged in acquiring, selecting, and processing (cataloging, indexing, abstracting) bibliographic material for the ERIC database. Since the ERIC Clearinghouses are geographically separated, it is necessary to have a single set of printed guidelines to achieve standardized inputs from all Clearinghouses and to ensure an internally consistent database.

The *EPM* is not intended as a guide to the internal centralized functions of the ERIC Processing and Reference Facility, although it deals with those functions essential for Clearinghouses to know, e.g., pagination procedures, vocabulary maintenance procedures, etc. Similarly, the *EPM* is not intended to cover the functions having to do with dissemination and use of the ERIC database, e.g., reference, user services, publication/product preparation, outreach, etc.

The *EPM* will also be of interest to some users in that it deals in detail with the construction of the database that those users search. The kinds of documents that are selected for ERIC, the definitions of the individual data elements cataloged, the rules for indexing and abstracting are all matters that affect retrieval and, when known, can improve retrieval results.

AVAILABILITY OF EPM

The *ERIC Processing Manual* (EPM) is a working document in daily use to provide the rules and conventions by which the ERIC database is constructed. It is routinely modified to meet new problems, to provide additional needed elaboration, and to be responsive to changes in priorities. All suggestions for change should be directed to the Editor, *ERIC Processing Manual*, at the ERIC Facility.

Revised pages are prepared and distributed to the Clearinghouses on an "as needed" basis. Each revised page is dated in the following way in order to distinguish it from the earlier dated page it replaces, e.g., *"Revised December 1992."* In addition, parallel lines are placed in the right hand margin in order to identify the specific text changed in the revision.

Shelf copies of the individual *EPM* sections all receive the revised pages at the time the revisions are printed. However, because of the wide distribution of the *EPM*, both domestically and abroad, it is not possible for ERIC to automatically provide revised pages to all previous recipients of the *EPM*.

Periodically, the number of revision pages added to a given Section becomes such that a general revision of the entire Section is done in order to smooth rough edges and integrate new material. Similarly, eventually it becomes necessary for the same reasons to prepare a totally new edition. The previous two full editions of the *EPM* were dated 1974 (ED-092 164) and 1980-83 (ED-219 082), respectively. The present edition is being issued in 1992 and supersedes all previous editions.

ACKNOWLEDGEMENTS

The *ERIC Processing Manual* (1992) has been prepared by the staff of the ERIC Processing and Reference Facility, under the general editorship of its Director, Ted Brandhorst. The Sections on "Acquisitions" and "Selection" were prepared by Gail Mathews, Acquisitions Librarian. The Sections on "Vocabulary Development and Maintenance—Descriptors" and "Indexing" were prepared by Jim Houston, Lexicographer. The Sections on "Cataloging", "Identifiers", and "Data Entry" were prepared by Carolyn Weller, Assistant Director, Operations. The Sections on "Introduction", "Handling and Shipping", "Abstracting/Annotating", "Database Changes (Post-Publication)", and "Document Preparation (For Filming)" were prepared by Ted Brandhorst. All Sections were reviewed by Central ERIC staff (particularly Kevin Arundel and Bob Thomas) and ERIC Steering Committee members (particularly Jane Henson (SO), Anita Colby (JC), and Sandra Kerka (CE)). Needless to say, the revisers built on sections prepared by previous generations of ERIC staff at the Clearinghouses, Central ERIC, and the Facility. Today's EPM contains the distilled expertise of literally hundreds of ERIC workers, 1966-1992.

I. INTRODUCTION

A. General

The purpose of this Section is to introduce the major organizational components of the Educational Resources Information Center (ERIC) system and the major products produced by those components. Section I.B provides a concise description of the functions performed by each component. Section I.C provides a concise description of each product.

As shown in **Figure I-1**, the components of the ERIC system are:

- Central ERIC

- ERIC Clearinghouses
  —Adjunct ERIC Clearinghouses

- Support Contractors/Services
  —ERIC Processing and Reference Facility
  —ERIC Document Reproduction Service (EDRS)
  —ACCESS ERIC
  —U.S. Government Printing Office (GPO)

- Private Sector Vendors
  —CIJE Publisher
  —Online Access Vendors
  —CD-ROM System Vendors
  —Other Vendors, e.g., Journal Article Reprint Services

Central ERIC is a program office within the U.S. Department of Education, Office of Educational Research and Improvement (OERI), and is the Governmental arm of ERIC.

The ERIC Clearinghouses are non-profit contractors located across the country on a decentralized basis within universities or non-profit organizations having a pre-existing interest in the subject area covered by the Clearinghouse.

The ERIC Processing and Reference Facility ("ERIC Facility"), the ERIC Document Reproduction Service (EDRS), and ACCESS ERIC are all for-profit support contractors providing technical and professional services for ERIC on a centralized basis.

The U.S. Government Printing Office (GPO), while not a formal member of the ERIC system is, in effect, the printing contractor for ERIC's monthly abstract journal *Resources in Education* (RIE).

The private sector vendors, that offer the public various value-added products/services based on the ERIC database, are not contractors to the ERIC system, but ERIC depends heavily on such entrepreneurial vendors to achieve wide dissemination of its data (at no cost to ERIC).

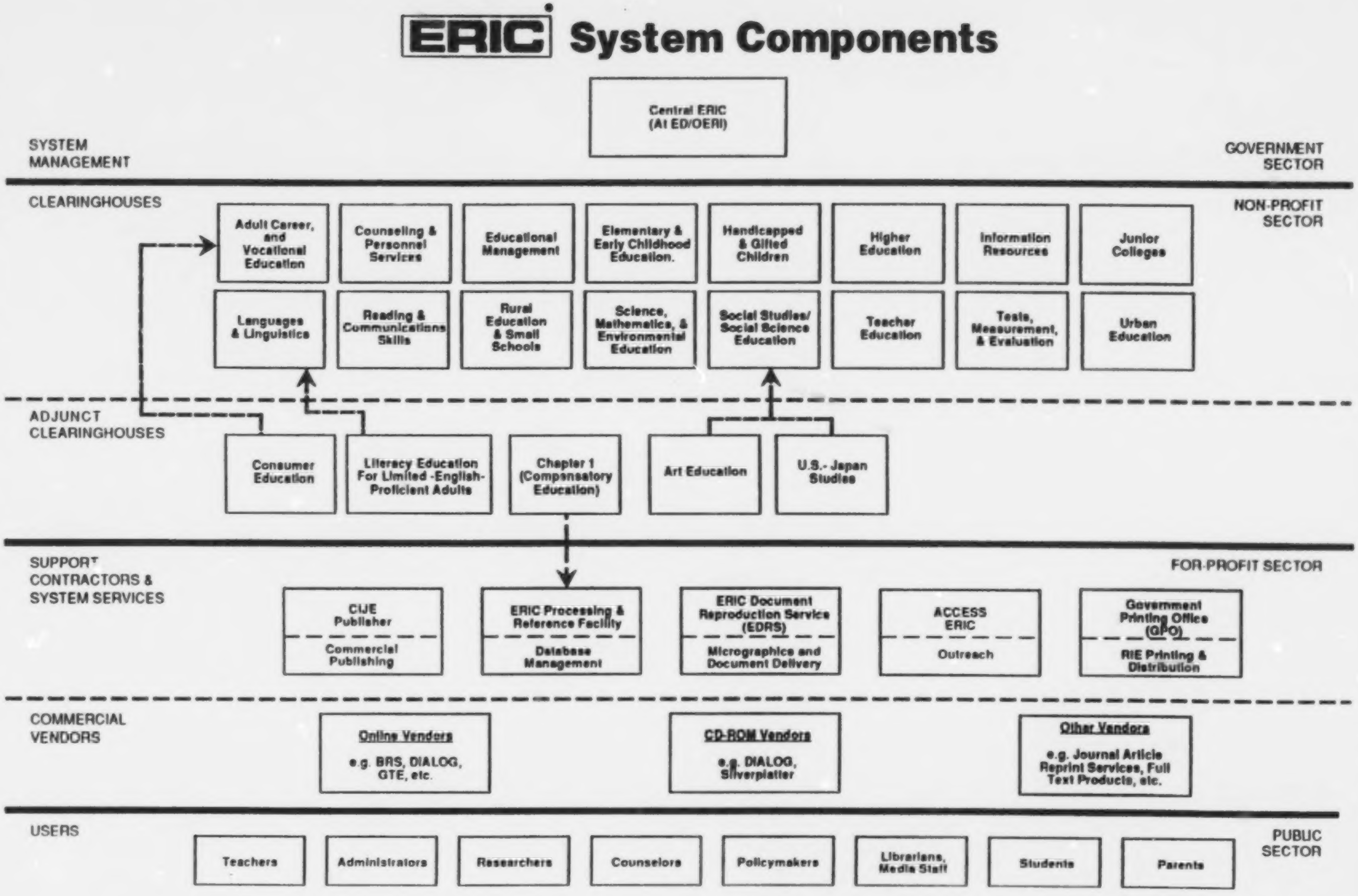

ERIC System Components
Central ERIC (At ED/OERI)
SYSTEM MANAGEMENT
GOVERNMENT SECTOR
CLEARINGHOUSES
NON-PROFIT SECTOR
Adult Career, and Vocational Education
Counseling & Personnel Services
Educational Management
Elementary & Early Childhood Education.
Handicapped & Gifted Children
Higher Education
Information Resources
Junior Colleges
Languages & Linguistics
Reading & Communications Skills
Rural Education & Small Schools
Science, Mathematics, & Environmental Education
Social Studies/ Social Science Education
Teacher Education
Tests, Measurement, & Evaluation
Urban Education
ADJUNCT CLEARINGHOUSES
Consumer Education
Literacy Education For Limited -English-Proficient Adults
Chapter 1 (Compensatory Education)
Art Education
U.S.- Japan Studies
SUPPORT CONTRACTORS & SYSTEM SERVICES
FOR-PROFIT SECTOR
CIJE Publisher
Commercial Publishing
ERIC Processing & Reference Facility
Database Management
ERIC Document Reproduction Service (EDRS)
Micrographics and Document Delivery
ACCESS ERIC
Outreach
Government Printing Office (GPO)
RIE Printing & Distribution
COMMERCIAL VENDORS
Online Vendors
e.g. BRS, DIALOG, GTE, etc.
CD-ROM Vendors
e.g. DIALOG, Silverplatter
Other Vendors
e.g. Journal Article Reprint Services, Full Text Products, etc.
USERS
PUBLIC SECTOR
Teachers
Administrators
Researchers
Counselors
Policymakers
Librarians, Media Staff
Students
Parents

FIGURE I-1: ERIC System Components

Full mailing addresses, telephone numbers, and staff names/titles for each of the formal ERIC components may be found in the *ERIC Network Directory*, which is revised approximately every six months and distributed throughout the system. Full mailing addresses, telephone numbers, and brief scope notes for all ERIC components can be found in the regularly revised ERIC Ready Reference #6. Full mailing addresses and telephone numbers for the major private sector vendors can be found in the *Pocket Guide to ERIC* brochure.

Each organization is described briefly in this Introduction, highlighting the major functions and responsibilities of each that pertain to database-building. The remainder of the *ERIC Processing Manual* (EPM) consists principally of detailed procedures and guidelines to be followed by the ERIC Clearinghouses in the performance of their database-building related functions.

The internal procedures of the ERIC Facility, ERIC Document Reproduction Service (EDRS), ACCESS ERIC, CIJE Publisher, and Central ERIC, are *not* covered by this *Manual*. Processing interactions among the system components are depicted schematically in **Figure I-2**. An historical introduction to the ERIC system, providing some background and an explanation for the present decentralized structure, is given as **Figure I-3**.

The major database-related products of the ERIC system are:

Resources in Eduction (RIE)
—Monthly abstract journal, covering documents

Current Index to Journals in Education (CIJE)
—Monthly abstract journal, covering journal articles

Thesaurus of ERIC Descriptors
—Subject indexing term authority list (controlled)

Identifier Authority List (IAL)
—Supplementary subject index term list (semi-controlled)

ERIC Database (in machine readable form)
—Magnetic tapes (ERICTAPES)
—Online files
—CD-ROM systems

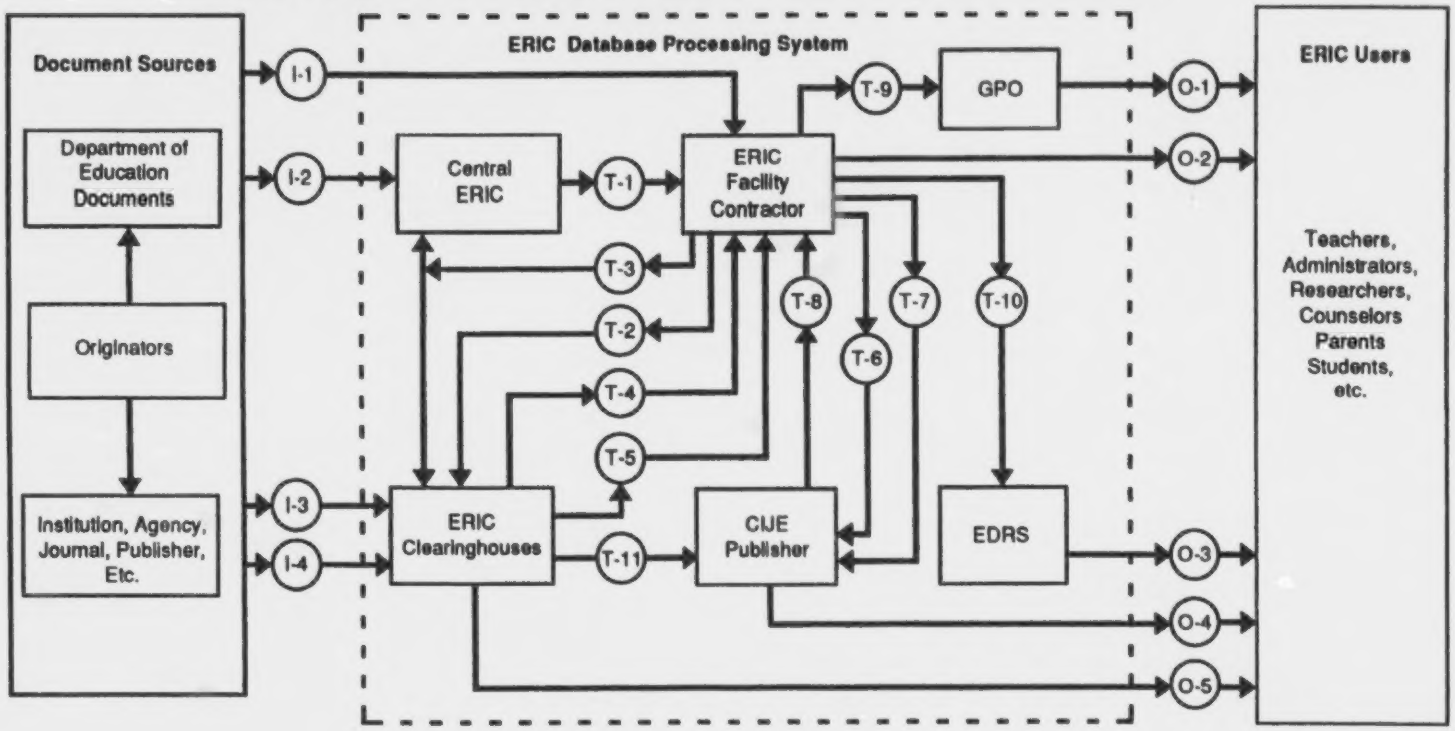
Document Reproduction
—Microfiche
—Paper Copy Blowback

Journal Article Reprints

ERIC Clearinghouse Publications
—Monographs, Reviews, Bibliographies, Syntheses, etc.
—Digests

Section I.C briefly describes each of the above products.

ERIC Database System - Major Processing Interactions


Document Sources
Department of Education Documents
Originators
Institution, Agency, Journal, Publisher, Etc.
I-1
I-2
I-3
I-4
ERIC Database Processing System
Central ERIC
ERIC Facility Contractor
GPO
ERIC Clearinghouses
CIJE Publisher
EDRS
T-1
T-2
T-3
T-4
T-5
T-6
T-7
T-8
T-9
T-10
T-11
O-1
O-2
O-3
O-4
O-5
ERIC Users
Teachers, Administrators, Researchers, Counselors Parents Students, etc.

I = Major Inputs

I-1	Facility Acquisitions Program Receipts (Documents Received via Specific Requests or Automatic Arrangements)
I-2	Department of Education Documents, Including Those Generated by Contractors and Grantees
I-3	Documents Acquired by Clearinghouses via Specific Request or Automatic Arrangement
I-4	Education-Related Journals

T = Major Intra-System Transfers

T-1	Documents to be Assigned to Clearinghouses
T-2	Documents That are Within ERIC'S Subject Scope --Assigned to Clearinghouses on the Basis of Individual Clearinghouse Scope of Interest Statements
T-3	Acquisitions Data Report, Working Copies of Thesaurus and Source Directory, CH/ED Cross-Reference List, Title Index, and other internal tools
T-4	Accessioned and Processed Documents (not articles)
T-5	Resumes (Bibliographic Data) for Documents and Articles (Transmitted Online)
T-6	Unedited CIJE Data (Checked for duplicates and valid index terms)
T-7	Thesaurus Tapes; RIE Tapes
T-8	CIJE Tape (Edited data in ERIC format)
T-9	RIE Tape (Videocomp format)
T-10	Accessioned Documents and Single-Frame Resumes
T-11	Notification of Added, Deleted, or Changed Journal Coverage (For CIJE "Source Journal Index")

O = Major Outputs

O-1	RIE Sales and Distribution
O-2	ERICTAPES/ERICTOOLS Sales and Distribution
O-3	Microfiche and Paper Copy Sales and Distribution
O-4	CIJE Sales and Distribution
O-5	Clearinghouse Publications Sales and Distribution

FIGURE I-2: ERIC SYSTEM--PROCESSING INTERACTIONS

ERIC® *Educational Resources Information Center**

ERIC stands for Educational Resources Information Center. ERIC was originally conceived in the U.S. Office of Education in the mid-1960's as a system for providing ready access to the educational literature. At the time ERIC was first discussed, the literature of education was uncontrolled. Research reports, submitted to OE by their contractors and grantees, received an initial scattered distribution and then essentially disappeared. Reports from other sources generally remained equally inaccessible. ERIC was intended to correct this chaotic situation and to provide a foundation for subsequent information analysis activities and attempts to spread the use of current developments.

Because of the decentralized nature of American education, the many specializations, and the existence of numerous professional organizations, ERIC's designers opted for a network of organizations rather than a single monolithic information center located in Washington. ERIC was conceived, therefore, as a network of "clearinghouses," located across the country in "host" organizations that were already strong in the subfield of education in which they would operate.

Contracts with Clearinghouses originally gave them responsibility for acquiring and selecting all documents in their area and for "processing" these documents. "Processing" includes the familiar surrogation activities of cataloging, indexing, and abstracting. This scheme has worked out very well. Virtually all observers of ERIC have concluded over time that the network of Clearinghouses does a better job of identifying and obtaining the current literature of education than one single information center in Washington could ever do. With their specialized subject expertise, Clearinghouse staff are well qualified to manage ERIC document selection functions. Decentralization has paid off as well for information analysis and user services activities. However, decentralization was not the complete answer. In order to generate products that included the output of all network components, information gathered by the Clearinghouses had to be assembled at one central place. ERIC's final design, therefore, included decentralized Clearinghouse operations integrated around a central computerized facility which serves as a switching center for the network. The data recorded by each of the Clearinghouses are sent to the Facility to form a central database from which publications and indexes are produced.

A similar design decision was made in order to supply the public with copies of reports added to the system. In order for ERIC to make documents available instead of just informing users that a given document existed, it was necessary to provide a document reproduction service from which any non-copyrighted document announced could be obtained. (When permission is obtained, copyrighted materials are also reproduced.) In other words, ERIC was developed as a complete document announcement and retrieval service.

Both of these centralized services had entrepreneurial aspects. The government obviously could not afford to subsidize every user's document needs. The document reproduction effort had to become self-supporting or it would become too expensive within Federal budgets. Therefore, users had to pay for reports they wanted. In the same way, dissemination of the database is not subsidized by the taxpayer; persons wanting ERIC magnetic tapes are required to meet order processing, tape, and duplication costs. The Federal government limits its investment in both areas by generating a fundamental database and then permitting the private sector to market it at prices as advantageous to the public as possible.

In support of this strategy, and also because the centralized operations depended on the use of then advanced technologies (computerized photocomposition and microreprographic technology), these functions were located in the commercial sector.

ERIC, therefore, emerges as a network with four levels. The first or governmental level is represented by Central ERIC (the funder, policy setter, and monitor). The second or non-profit level is made up of 16 Clearinghouses located at universities or professional societies. The third or commercial level consists of the centralized facilities and support contractors for managing the database, putting out published products, making microfiche, and reproducing documents. Fourth are the users (teachers, administrators, researchers, policymakers, counselors, parents, students, etc.) who receive the benefit of these activities.

---

*Now located within:
Office of Educational Research and Improvement (OERI)
Department of Education (ED)
Washington, DC 20208

FIGURE I-3: ERIC–An Historical and Developmental Profile

B. ERIC System Components

1. Central ERIC

Central ERIC is located within the Office of Educational Research and Improvement (OERI), U.S. Department of Education, and acts as the funding source, policymaker, manager, and monitor of the ERIC system. Activities of all other components of the system are monitored by Central ERIC to ensure contract compliance and quality products and services. ERIC program staff make policy and budget determinations, establish goals and future directions, plan systemwide activities, and approve development of new products and services. All questions relating to basic ERIC policies should be directed to Central ERIC.

2. ERIC Clearinghouses

The ERIC Clearinghouses have responsibility within the network for acquiring the significant educational literature within their particular scope, selecting the highest quality and most relevant material, and processing (i.e., cataloging, indexing, abstracting) the selected items for input to the database. It is these database-building procedures that are covered by this *Manual*. In addition, Clearinghouses provide reference and retrieval services, develop information analysis products, conduct workshops and make presentations, and generate other types of communication links within the educational community. These latter output functions are not covered by this *Manual*.

There are currently sixteen ERIC Clearinghouses located at various points across the United States, each housed at a non-profit institution. The number of Clearinghouses has fluctuated over time, in response to changing educational needs and policies.

The major Clearinghouse functions covered in detail by this *Manual* are as follows:

- Acquisition of Resource Materials (Documents and Journal Articles)

- Selection/Evaluation (Input Screening)
  - —Scope (in/out) Determination
  - —Quality Level (Sufficient/Insufficient) Determination

- Document Control
  - —Duplicate Checking
  - —Reproducibility/Legibility Checking
  - —Copyright Status Determination
  - —Level of Processing Determination (1, 2, or 3)
  - —Labeling (Policy and Copyright Labels)
  - —Accessioning (Logging, Assigning Clearinghouse Accession Number)

- Document Processing
  - —Descriptive Cataloging
  - —Abstracting/Annotating
  - —Indexing

- Data Entry
- Handling and Shipping
- Vocabulary Maintenance (Suggesting New Index Terms)

The major Clearinghouse functions *not* covered by this *Manual* can be briefly elaborated upon as follows:

- **Developing Clearinghouse Publications**

  Clearinghouse publications may include research reviews, papers summarizing or synthesizing given topics, digests (two-page syntheses, with pointers to additional sources), bibliographies (annotated and unannotated), state-of-the-art papers, monographs, guides to a field or to the literature of a field, and a wide variety of other information analysis publications. The particular products developed by a given Clearinghouse will depend on such factors as: the user group served; priorities established by Clearinghouse staff; Clearinghouse Advisory Board input; Central ERIC and OERI requests, priorities, and initiatives, etc.

- **Providing Reference and Retrieval Services**

  Reference assistance and retrieval services are provided to individual users. These services may include conducting and providing results of literature searches, developing tailored bibliographies, identifying sought-after documents, and providing information on the ERIC system and its use. Referrals to other databases and sources of information are also made.

- **User Services**

  — **Conducting Workshops and Presentations**

  Clearinghouses conduct workshops and make presentations on how to use the ERIC System and the products generated by the system (including both basic reference tools such as RIE and CIJE, and information analysis products). Education of the user community in order to extend and improve system use is a constant activity.

  — **Developing and Maintaining Linkages with User Groups**

  A number of communication links, procedures, and products have been established by Clearinghouses to provide information to users and to obtain materials from them, e.g., newsletters, articles, regular journal columns, conference participation (including exhibit booths), etc. Professional associations and the various intermediate information transfer units are very helpful in achieving these Clearinghouse objectives.

Each Clearinghouse is identified by a two-character alphabetic prefix and all documents and journal articles processed by the ERIC Clearinghouses for *Resources in Education* (RIE) or *Current Index to Journals in Education* (CIJE) are assigned Clearinghouse Accession Numbers that begin with these prefixes. A complete list of all prefixes used to date (and therefore all ERIC Clearinghouses that have existed to date) appears in **Figure I-4.**

Figure I-5 (ERIC Ready Reference #6) is a complete list of all currently operating ERIC Clearinghouses, together with a brief indication of their respective scopes of interest. The *ERIC Network Directory* provides complete mailing addresses, telephone numbers, and staff names and titles for all Clearinghouses. *Appendix A* of the *EPM*, the *ERIC Clearinghouse Scope of Interest Guide*, provides a fully detailed guide to the subject matter and topical areas covered by each Clearinghouse.

a. Adjunct ERIC Clearinghouses

An *"Adjunct Clearinghouse"* is an organization having a special interest in a topic within a regular ERIC Clearinghouse's scope and willing to affiliate itself with that Clearinghouse, at no cost to ERIC, for the purpose of improving bibliographic control over the literature in its special interest area.

Typically, an Adjunct Clearinghouse collects the specialized literature in its area of interest, processes that literature following ERIC guidelines (i.e., this *Manual*) and then sends the documents or journal articles, together with the results of its processing, to the "parent" ERIC Clearinghouse for its consideration. The ERIC Clearinghouse then applies the same selection criteria, accessioning, and other procedures that it would for any document received; the only difference is that the processing data generated by the Adjunct need only be edited rather than generated "from scratch."

There is no prior commitment that every item input by an Adjunct Clearinghouse will be accepted by ERIC. Adjunct Clearinghouses receive no funds from ERIC, though they generally receive free of charge the regular forms, labels, authority lists, manuals, and reference tools required for ERIC processing.

Adjunct Clearinghouses are a way of improving ERIC's coverage of the literature of education without incurring substantial additional processing costs. There are Adjunct ERIC Clearinghouses on Art Education, United States-Japan Studies, Literacy Education for Limited-English-Proficient Adults, Chapter 1 (Compensatory Education), and Consumer Education. Additional Adjunct Clearinghouses will be "commissioned" as the opportunities arise. (See **Figure I-6** for a list of current Adjunct ERIC Clearinghouses.)

b. ERIC Partners

ERIC Partners are organizations enlisted by the Clearinghouses to aid in the process of disseminating ERIC information and to help provide documents and user feedback for the benefit of the ERIC system. In return, ERIC Partners receive timely distributions of ERIC information and reduced rates on certain products.

ERIC CLEARINGHOUSES--A COMPLETE LIST (WITH PREFIXES)

PREFIX	CLEARINGHOUSE	STATUS
AA	ERIC Facility Contractor (For RIE) CIJE Publisher (For CIJE)	Current
AC	Adult Education	Merged into CE in 1973
AL	Linguistics	Merged into FL in 1971
CE	Adult, Career, and Vocational Education *(including input of Adjunct ERIC Clearinghouse for Consumer Education, since June 1991)*	Current
CG	Counseling and Personnel Services	Current
CS	Reading and Communication Skills	Current
EA	Educational Management	Current
EC	Handicapped and Gifted Children	Current
EF	Educational Facilities	Merged into EA in 1970
EM	Educational Media and Technology	Merged into IR in 1974
FL	Languages and Linguistics *(including input of Adjunct ERIC Clearinghouse on Literacy Education for Limited-English-Proficient Adults, since September 1989)*	Current
HE	Higher Education	Current
IR	Information Resources	Current
JC	Junior Colleges	Current
LI	Library and Information Sciences	Merged into IR in 1974
PS	Elementary and Early Childhood Education	Current
RC	Rural Education and Small Schools	Current
RE	Reading	Merged into CS in 1972
SE	Science, Mathematics, and Environmental Education	Current
SO	Social Science/Social Studies Education *(including input of Adjunct ERIC Clearinghouse for Art Education and Adjunct ERIC Clearinghouse on United States-Japan Studies, since March 1990)*	Current
SP	Teacher Education	Current
TE	Teaching of English	Merged into CS in 1972
TM	Tests, Measurement, and Evaluation	Current
UD	Urban Education	Current
VT	Vocational and Technical Education	Merged into CE in 1973

FIGURE I-4: ERIC CLEARINGHOUSES--A COMPLETE LIST (WITH PREFIXES)

Ready Reference # 6
Revised February 1992

ERIC CLEARINGHOUSES *(and Other Network Components)*

The ERIC Clearinghouses have responsibility within the network for acquiring the significant educational literature within their particular areas, selecting the highest quality and most relevant material, processing (i.e., cataloging, indexing, abstracting) the selected items for input to the database, and also for providing information analysis products and various user services based on the database.

The exact number of Clearinghouses has fluctuated over time in response to the shifting needs of the educational community. There are currently 16 Clearinghouses. These are listed below, together with full addresses, telephone numbers, and brief scope notes describing the areas they cover.

ERIC Clearinghouse on *Adult, Career, and Vocational Education* (CE)
Ohio State University
Center on Education and Training for Employment
1900 Kenny Road
Columbus, Ohio 43210-1090
Telephone: (614) 292-4353;
(800) 848-4815 Fax: (614) 292-1260

All levels of adult and continuing education from basic literacy training through professional skill upgrading. The focus is upon factors contributing to the purposeful learning of adults in a variety of life situations usually related to adult roles (e.g., occupation, family, leisure time, citizenship, organizational relationships, retirement, and so forth).

ERIC Clearinghouse on *Counseling and Personnel Services* (CG)
University of Michigan
School of Education, Room 2108
610 East University Street
Ann Arbor, Michigan 48109-1259
Telephone: (313) 764-9492 Fax: (313) 747-2425

Preparation, practice, and supervision of counselors at all educational levels and in all settings. Theoretical development of counseling and guidance, including the nature of relevant human characteristics. Use and results of personnel practices and procedures. Group process (counseling, therapy, dynamics) and case work.

ERIC Clearinghouse on *Educational Management* (EA)
University of Oregon
1787 Agate Street
Eugene, Oregon 97403-5207
Telephone: (503) 346-5043 Fax: (503) 346-5890

All aspects of the governance, leadership, administration, and structure of public and private educational organizations at the elementary and secondary levels, including the provision of physical facilities for their operation.

ERIC Clearinghouse on *Elementary and Early Childhood Education* (PS)
University of Illinois
805 W. Pennsylvania Avenue
Urbana, Illinois 61801-4897
Telephone: (217) 333-1386 Fax: (217) 333-3767

All aspects of the physical, cognitive, social, emotional, educational, and cultural development of children, from birth through early adolescence. Among the topics covered are: prenatal and infant development and care; parent education; home and school relationships; learning theory research and practice related to children's development; preparation of early childhood teachers and caregivers; and educational programs and community services for children.

ERIC Clearinghouse on *Handicapped and Gifted Children* (EC)
Council for Exceptional Children
1920 Association Drive
Reston, Virginia 22091-1589
Telephone: (703) 264-9474 Fax: (703) 264-9494

All aspects of the education and development of persons (of all ages) who have disabilities or who are gifted, including the delivery of all types of education-related services to these groups. Includes prevention, identification and assessment, intervention, and enrichment for these groups, in both regular and special education settings.

ERIC Clearinghouse on *Higher Education* (HE)
George Washington University
One Dupont Circle, N.W., Suite 630
Washington, D.C. 20036-1183
Telephone: (202) 296-2597 Fax: (202) 296-8379

All aspects of the conditions, programs, and problems at colleges and universities providing higher education (i.e., four-year degrees and beyond). This includes: governance and management; planning; finance; inter-institutional arrangements; business or industry programs leading to a degree; institutional research at the college/university level; Federal programs; legal issues and legislation; professional education (e.g., medicine, law, etc.) and professional continuing education.

ERIC Clearinghouse on *Information Resources* (IR)
Syracuse University
Huntington Hall, Room 030
800 University Avenue
Syracuse, New York 13244-2340
Telephone: (315) 443-3640 Fax: (315) 443-5732

Educational technology and library/information science at all academic levels and with all populations, including the preparation of professionals. The media and devices of educational communication, as they pertain to teaching and learning (in both conventional and distance education settings). The operation and management of libraries and information services. All aspects of information management and information technology related to education.

ERIC Clearinghouse for *Junior Colleges* (JC)
University of California at Los Angeles (UCLA)
Math-Sciences Building, Room 8118
405 Hilgard Avenue
Los Angeles, California 90024-1564
Telephone: (310) 825-3931 Fax: (310) 206-8095

Development, administration, and evaluation of two-year public and private community and junior colleges, technical institutes, and two-year branch university campuses. Two-year college students, faculty, staff, curricula, programs, support services, libraries, and community services. Linkages between two-year colleges and business/industrial/community organizations. Articulation of two-year colleges with secondary and four-year postsecondary institutions.

ERIC Clearinghouse on *Languages and Linguistics* (FL)
Center for Applied Linguistics
1118 22nd Street, N.W.
Washington, D.C. 20037-0037
Telephone: (202) 429-9551 Fax: (202) 429-9766

Languages and language sciences. All aspects of second language instruction and learning in all commonly and uncommonly taught languages, including English as a second language. Bilingualism and bilingual education. Cultural education in the context of second language learning, including intercultural communication, study abroad, and international educational exchange. All areas of linguistics, including theoretical and applied linguistics, sociolinguistics, and psycholinguistics.

ERIC Clearinghouse on *Reading and Communication Skills* (CS)
Indiana University, Smith Research Center
2805 East 10th Street, Suite 150
Bloomington, Indiana 47408-2698
Telephone: (812) 855-5847 Fax: (812) 855-7901

Reading and writing, English (as a first language), and communications skills (verbal and nonverbal), kindergarten through college. Includes family or intergenerational literacy. Research and instructional development in reading, writing, speaking, and listening. Identification, diagnosis, and remediation of reading problems. Speech communication (including forensics), mass communication (including journalism), interpersonal and small group interaction, oral interpretation, rhetorical and communication theory, and theater/drama. Preparation of instructional staff and related personnel in all the above areas.

ERIC Clearinghouse on *Rural Education and Small Schools* (RC)
Appalachia Educational Laboratory
1031 Quarrier Street
P.O. Box 1348
Charleston, West Virginia 25325-1348
Telephone: (800) 624-9120 (Outside WV)
(800) 344-6646 (In WV) Fax: (304) 347-0487

Curriculum and instructional programs and research/evaluation efforts that address the education of students in rural schools or districts, small schools wherever located, and schools or districts wherever located that serve American Indian and Alaskan natives, Mexican Americans, and migrants, or that have programs related to outdoor education. Includes the cultural, ethnic, linguistic, economic, and social conditions that affect these educational institutions and groups. Preparation programs, including related services, that train education professionals to work in such contexts.

ERIC Clearinghouse for *Science, Mathematics, and Environmental Education* (SE)
Ohio State University
1200 Chambers Road, Room 310
Columbus, Ohio 43212-1792
Telephone: (614) 292-6717 Fax: (614) 292-0263

Science, mathematics, engineering/technology, and environmental education at all levels. The following topics when focused on any of the above broad scope areas: applications of learning theory; curriculum and instructional materials; teachers and teacher education; educational programs and projects; research and evaluative studies; applications of educational technology and media.

ERIC Clearinghouse for *Social Studies/Social Science Education* (SO)
Indiana University
Social Studies Development Center
2805 East 10th Street, Suite 120
Bloomington, Indiana 47408-2698
Telephone: (812) 855-3838 Fax: (812) 855-7901

All aspects of Social Studies and Social Science Education, including values education (and the social aspects of environmental education and sex education), international education, comparative education, and cross-cultural studies in all subject areas (K-12). Ethnic heritage, gender equity, aging, and social bias/discrimination topics. Also covered are music, art, and architecture as related to the fine arts.

ERIC Clearinghouse on *Teacher Education* (SP)
American Association of Colleges for Teacher Education (AACTE)
One Dupont Circle, N.W., Suite 610
Washington, D.C. 20036-1186
Telephone: (202) 293-2450 Fax: (202) 457-8095

School personnel at all levels. Teacher recruitment, selection, licensing, certification, training, preservice and inservice preparation, evaluation, retention, and retirement. The theory, philosophy, and practice of teaching. Organization, administration, finance, and legal issues relating to teacher education programs and institutions. All aspects of health, physical, recreation, and dance education.

ERIC Clearinghouse on *Tests, Measurement, and Evaluation* (TM)
American Institutes for Research (AIR)
Washington Research Center
3333 K St., N.W.
Washington, DC 20007-3541
Telephone: (202) 342-5060 Fax: (202) 342-5033

All aspects of tests and other measurement devices. The design and methodology of research, measurement, and evaluation. The evaluation of programs and projects. The application of tests, measurement, and evaluation devices/instrumentation in educational projects and programs.

ERIC Clearinghouse on *Urban Education* (UD)
Teachers College, Columbia University
Institute for Urban and Minority Education
Main Hall, Room 300, Box 40
525 W. 120th Street
New York, New York 10027-9998
Telephone: (212) 678-3433 Fax: (212) 678-4048

The educational characteristics and experiences of the diverse racial, ethnic, social class, and linguistic populations in urban (and suburban) schools. Curriculum and instruction of students from these populations and the organization of their schools. The relationship of urban schools to their communities. The social and economic conditions that affect the education of urban populations, with particular attention to factors that place urban students at risk educationally, and ways that public and private sector policies can improve these conditions.

Educational Resources Information Center (Central ERIC)
U.S. Department of Education
Office of Educational Research and Improvement (OERI)
555 New Jersey Ave., N.W.
Washington, D.C. 20208-5720
Telephone: (202) 219-2289 Fax: (202) 219-1817

ERIC Processing & Reference Facility
ARC Professional Services Group
Information Systems Division
1301 Piccard Drive, Suite 300
Rockville, Maryland 20850-4305
Telephone: (301) 258-5500 Fax: (301) 948-3695

ERIC Document Reproduction Service (EDRS)
Cincinnati Bell Information Systems (CBIS) Federal
7420 Fullerton Road, Suite 110
Springfield, Virginia 22153-2852
Telephone: (703) 440-1400
(800) 443-ERIC Fax: (703) 440-1408

Oryx Press
4041 North Central Avenue at Indian School, Suite 700
Phoenix, Arizona 85012-3397
Telephone: (602) 265-2651
(800) 279-6799 Fax: (602) 265-6250

ACCESS ERIC
Aspen Systems Corporation
1600 Research Boulevard
Rockville, Maryland 20850-3166
Telephone: (301) 251-5045
(800) 873-3742 Fax: (301) 251-5212

ADJUNCT ERIC CLEARINGHOUSES

	Adjunct To
Adjunct ERIC Clearinghouse for Art Education (AR) Indiana University Social Studies Development Center 2805 East 10th Street, Suite 120 Bloomington, Indiana 47408-2373 (812) 855-3838	ERIC/SO
Adjunct ERIC Clearinghouse on Chapter 1 (CHP-1) Chapter 1 Technical Assistance Center PRC Inc. 2601 Fortune Circle East One Park Fletcher Building Suite 300-A Indianapolis, Indiana 46241 (317) 244-8160	ERIC Facility
Adjunct ERIC Clearinghouse on Consumer Education (CN) National Institute for Consumer Education 207 Rackham Building, West Circle Drive Eastern Michigan University Ypsilanti, Michigan 48197 (313) 487-2292	ERIC/CE
Adjunct ERIC Clearinghouse for United States-Japan Studies Indiana University Social Studies Development Center 2805 East 10th Street, Suite 120 Bloomington, Indiana 47408-2373 (812) 855-3838	ERIC/SO
Adjunct ERIC Clearinghouse on Literacy Education for Limited-English-Proficient Adults (LE) Center for Applied Linguistics (CAL) 1118 22nd Street, NW Washington, DC 20037 (202) 429-9292	ERIC/FL

FIGURE I-6: ADJUNCT ERIC CLEARINGHOUSES

ERIC Partners are, in many cases, the same organizations as listed in the microfiche Standing Order Customer (SOC) lists, the RIE/CIJE Subscriber lists, the ERIC Acquisitions Arrangements list, and the *Directory of ERIC Information Service Providers*. The concept of being an *"ERIC Partner"* is, to a certain extent, simply a formalization of a relationship that may already have existed informally for years. Except for their role as potential sources of documents, ERIC Partners are not involved in the formal process of building the ERIC database and none of their functions are covered in this *Manual*.

3. Support Contractors

a. ERIC Processing and Reference Facility

The ERIC Processing and Reference Facility is a centralized processing facility serving all components of the ERIC network, i.e., Central ERIC, the decentralized Clearinghouses, ERIC Document Reproduction Service, ACCESS ERIC, and the various vendor organizations, such as the CIJE Publisher. It is under the policy direction of Central ERIC. Services provided by the ERIC Facility include:

- Acquisition and assignment (of documents);
- Authority list maintenance;
- Computer processing;
- Data preparation and correction;
- Database management;
- Document control;
- Document processing (cataloging, indexing, abstracting);
- Duplicate checking;
- Editorial review;
- Handing and shipping;
- Lexicography;
- Photocomposition and publication preparation;
- Programming;
- Reference responses; and
- System and file maintenance.

The Facility prepares and delivers a variety of products and publications from the ERIC database. These include, among others:

- ***Resources in Education (RIE),***
  ERIC's monthly abstract journal covering documents;

- ***Thesaurus of ERIC Descriptors,***
  The controlled subject indexing vocabulary of the ERIC database; an authority list of permissible subject index terms, (mostly conceptual in nature) in alphabetic, rotated, and hierarchical displays;

- ***ERIC Source Directory,***
  An authority list of the names of organizations preparing and sponsoring documents contributed to the ERIC system;

- ***ERIC Title Index (RIE only),***
  An alphabetic list of the titles of all documents added to the RIE portion of the ERIC database, in alphabetic and category displays;

- ***Identifier Authority List (IAL)***
  A semi-controlled subject indexing vocabulary that supplements the *Thesaurus* by being an authority list of the names of things (e.g., projects, persons, places, equipment, laws, works of art, theories, etc.) that are the subjects of documents in the ERIC database, in alphabetic and category displays;

- ***Clearinghouse Number/ED Number Cross-Reference List,***
  A cross-reference between the Clearinghouse temporary accession number and the final ED number assigned to the document;

- ***ERIC Administrative Bulletin (EAB),***
  The internal "house organ" of the ERIC system, containing all news and documentation pertaining to operation of the ERIC system;

- ***ERIC Network Directory***
  The internal telephone directory for the ERIC system, listing all addresses, telephone numbers, 800 numbers, FTS numbers, FAX numbers, staff names, staff titles, working hours, monitors, SOC responsibilities, state responsibilities, language bank, committee/task force memberships, and contact points for special purposes;

- ***Bibliography of Publications About ERIC***
  A bibliography done approximately every three years containing citations for writings where ERIC is the subject;

- ***ERIC Clearinghouse Publications***
  An annual bibliography of all ERIC Clearinghouse publications input to the ERIC database in the past year.

Staff of the Facility serve ERIC in an advisory capacity, participate in all technical and database user meetings, and perform analyses of the database. A heavy emphasis is placed by the Facility on scheduling, statistical reporting, quality control, and cost accounting.

The major Facility functions covered by this Manual are as follows:

- ***Acquisition and Assignment of Documents (for RIE)***
  The ERIC Facility performs an acquisitions functions principally aimed at obtaining education-related documents from Government agencies and from foreign and international organizations. For these sources of documents, the Clearinghouses are directed to work through the Facility. Documents obtained from these efforts, as well as documents originated or otherwise obtained directly by the U.S. Department of Education, are assigned by the Facility to the appropriate Clearinghouse in accordance with the Clearinghouse statements of scope (see **Appendix A**). The Facility does not exercise an evaluation/selection function.

- ***Handling and Shipping***
  Each shipment of documents from the Clearinghouses to the Facility is checked against the accompanying log sheet to verify completeness of the shipment. The documents are then checked to ensure attachment of the appropriate policy statements and reproduction releases and are paginated for filming purposes. The documents and accompanying logsheets are put with their respective bibliographic resumes and then forwarded for editing of the Clearinghouse processing work.

- ***Data Entry***
  The Facility receives online weekly transmissions of bibliographic data from the Clearinghouses, including bibliographic citations or "resumes" for both RIE and CIJE, the full text of ERIC Digests, as well as the in-progress data for the *Acquisitions Data Report* (ADR), for use in duplicate checking.

- ***Editing***
  Documents and completed resume forms, for which processing has been accomplished by the Clearinghouses, are received by the editors and checked to ensure completeness and correctness of all entries and compliance with the cataloging, indexing, and abstracting provisions of the *ERIC Processing Manual* (EPM).

- ***Vocabulary Maintenance***
  The ERIC Facility Lexicographer, with the assistance of a nationwide Vocabulary Review Group (VRG), reviews all proposed Descriptors recommended by the Clearinghouses, approving or denying each term. Descriptor Scope Notes (definitions) and cross-reference structures are refined, if necessary. Similarly, all suggestions for changes of existing terminology are reviewed for feasibility, advisability, impact, and compliance with the *"Vocabulary Development and Maintenance"* section of the EPM.

The major Facility functions *not* covered by this Manual are as follows:

- ***Distribution of Documents***
  Includes complimentary distribution of RIE and CIJE and distribution of ERIC-related handout and exhibit materials.

- ***Reference Responses and User Services***
  General information about the ERIC system and ordering information for specific sought-after documents is provided to a wide variety of users who have directed their inquiries to the Department of Education, Central ERIC, GPO, LC, etc. Systemwide *"Reference and User Services"* procedures are covered in a separate manual by that name. Referrals are made when appropriate.

- ***Computer Searches***
  Computer searches of the ERIC database (RIE and CIJE) are made at the request of Central ERIC and in support of regular ERIC Facility functions, e.g., Acquisitions, Lexicography.

- ***Computer Processing***
  RIE and CIJE final edited and corrected data in machine-readable form are used to update the ERIC master magnetic tape and direct access computerized files. Various publications and indexes are generated from these files via a series of computer programs (documented in the *ERIC System Documentation*).

- ***ERICTAPES/ERICTOOLS Project***
  The ERIC Facility Contractor is authorized by Central ERIC to copyright the ERIC database and to make the ERIC database, and various internal ERIC reference publications, e.g., *Title Index*, available to the public via a self-sustaining program not requiring Government subsidy. The publications are sold. The tapes are licensed and involve a usage fee for commercial vendors of 10%.

b. ERIC Document Reproduction Service (EDRS)

EDRS is the document delivery component of the ERIC network. All non-copyrighted documents (and any others for which reproduction permission has been obtained) announced in *Resources in Education* are forwarded from the ERIC Facility to EDRS, where they are microfilmed and converted into microfiche (4" x 6" flat sheets of microfilm) according to Federal and national standards.

Interested users may obtain copies of ERIC documents from EDRS in either microfiche (at 24X reduction) or paper copy blowback (at 100% original size). Orders are accepted on either an on-demand or subscription basis. Subscribers may order the entire microfiche collection (monthly this amounts to approximately 1,000 titles contained on about 1,300 microfiche) or subsets of the entire collection (such as all the titles input by a particular Clearinghouse). There are currently over 800 organizations that subscribe to the entire ERIC microfiche collection on a continuing basis. These are made up of Federal agencies, universities and colleges, state and local education agencies, school systems, professional associations, non-profit groups, etc. There are over 100 subscriptions from foreign countries. Individual users consist of teachers, students, researchers, planners, administrators, counselors, therapists, and numerous other members of the educational community. Each document announced in *Resources in Education* carries with it an EDRS price code (or alternate source of availability):

(1) Individual on-demand *microfiche* are sold at a price of $1.16 per title, as long as the document fits on five cards or less (i.e., is 480 pages or less). The price increases $0.25 for each additional card (i.e., 96 page increment or fraction thereof) required.

(2) Individual on-demand blowback *paper copies* are sold on a price scale beginning at $3.20 for 1-25 pages and rising $3.20 for each additional 25 page increment (or fraction thereof).

Microfiche may be purchased on a standing order basis at a bargain price (encouraging subscriptions) of $.138 per microfiche, or about $2,000 a year for around 17,000 microfiche. Prices are subject to change so it is important to always consult the EDRS Order Form for full current price information.

None of the functions performed by EDRS are covered by the EPM (with the exception of post-publication changes to the microfiche (see **Section X**.)

c. *ACCESS ERIC*

The ACCESS ERIC contractor specializes in all forms of outreach (e.g., dissemination, publicity, promotion, advertising, public relations, referrals, exhibits, user training, systemwide brochures, directories, etc.). ACCESS ERIC is not involved in the processing that generates the ERIC database, but rather in directing users in the use of the database once it has been created.

The major products of ACCESS ERIC are: *The ERIC Review*; *ERIC Calendar of Education-Related Conferences*; *ERIC Directory of Education-Related Information Centers*; *Directory of ERIC Information Service Providers*; *Catalog of ERIC Clearinghouse Publications* (i.e., those still in-print); *Interchange* (newsletter).

None of the functions performed by ACCESS ERIC are covered in this *Manual*.

d. *U.S. Government Printing Office (GPO)*

The U.S. Government Printing Office receives each month from the ERIC Facility a magnetic tape containing the contents of an issue of RIE. Using the Videocomp high-speed photocomposition device, GPO composes camera-ready made-up pages for the issue, and prints and binds sufficient copies to handle subscription, complimentary distribution, and on-demand order requirements. All subscriptions to RIE and all initial distributions to paid subscribers, are handled by GPO. Complimentary distribution is handled by the ERIC Facility. On-demand orders for single copies or the semiannual cumulative index are handled by GPO as long as the supply lasts (usually 3-4 months following publication). Annual cumulations of both RIE abstracts and indexes are reprinted in hardbound form by the CIJE Publisher.

None of the functions performed by GPO are covered in this *Manual*.

4. Private Sector Vendors

a. *Current Index to Journals in Education* (CIJE) Publisher

CIJE was begun in 1969 as an early joint venture between ERIC and the commercial publishing realm to expand the scope of the ERIC database to include the major journals in the field of education. In addition to this index to journal literature in the field of education, the CIJE Publisher serves as the major commercial hardbound publisher utilizing the ERIC database for the preparation of a variety of publications, e.g., annual RIE cumulations, *Thesaurus of ERIC Descriptors*, etc.

- ***Selection Acquisition, and Assignment of Journals to be Covered by CIJE***
  Journals to be covered, either comprehensively or selectively, are recommended by Clearinghouses, subject to the approval of Central ERIC. Clearinghouses are assigned journals on the basis of their scope of interest. The "official" list of journals regularly covered by the ERIC Clearinghouses is maintained by the CIJE Publisher and is printed in each issue of CIJE as the "*Source Journal Index.*"

- ***Input Screening***
  Clearinghouses transmit completed resumes for journal articles to the ERIC Facility. The Facility converts the data to ERIC format and sends the resultant tape to the CIJE Publisher, where the data and records are checked against the accompanying log sheet to verify completeness of the shipment.

- ***Editing***
  All completed journal article resumes are edited by the CIJE publisher to ensure accuracy, completeness, and compliance with the cataloging, abstracting/annotating, and indexing sections of this *Manual*.

  The major CIJE Publisher functions *not* covered by this *Manual* are as follows:

  - Computer Processing (to produce CIJE)
  - CIJE Marketing, Sales, Distribution

b. *Online Access Vendors*

There are several vendors in the business of offering the public online access to bibliographic databases. Several of these vendors obtain the ERIC database (on a monthly basis) from the ERIC Facility (under terms of the ERICTAPES project) and make it available to users on a worldwide basis via their respective proprietary search and retrieval systems. The major such online vendors currently are: BRS, DIALOG, and GTE Education Services. (See *Pocket Guide to ERIC* or *All About ERIC* brochures for vendor addresses and telephone numbers.)

The online vendors are not involved in the processing that creates the ERIC database and are not covered by the EPM.

c. *CD-ROM System Vendors*

Several vendors have created stand-alone CD-ROM-based retrieval systems that can access the ERIC database. These vendors obtain the ERIC database (usually on a quarterly basis) from the ERIC Facility (under terms of the ERICTAPES project) and make it available to users worldwide on a subscription basis via their respective proprietary search and retrieval systems. The major CD-ROM vendors currently are: DIALOG and SilverPlatter.

The CD-ROM vendors are not involved in the processing that creates the ERIC database and are not covered by the EPM.

d. *Journal Article Reprint Services*

The journal articles announced in CIJE generally come from copyrighted professional journals and, because of publisher restrictions, cannot be reduced to microfiche by ERIC as readily as the documents announced in RIE. For this reason, ERIC does *not* attempt to film journal articles or to itself provide "document delivery" for CIJE journal article reprints. Instead ERIC refers users either to libraries (generally university or college libraries) that subscribe to the journals involved, or to a few commercial services that provide journal article reprints for a fee. (See brochures referred to above for addresses and telephone numbers.)

Two of the major journal article reprint services are:

(1) University Microfilms International (UMI), Article Clearinghouse; and

(2) Institute for Scientific Information (ISI), Genuine Article Service.

Journal article reprint vendors are not involved in the processing that generates the ERIC database and are *not* covered by the EPM.

C. *Major ERIC Products*

A large number of information products result from the efforts of the various members of the ERIC network and its vendors. The major products are described briefly below. Since prices are subject to periodic change without advance notice, the reader should be alert to this possibility.

1. ***Resources in Education*** **(RIE)**

RIE is a paperbound monthly (12 issues per year) abstract journal that announces reports and documents dealing with all aspects of education, i.e., research reports, program descriptions, instructional materials. RIE consists of a resume section of document abstracts, and index sections consisting of separate Subject, Author, Institution, Publication Type, and Clearinghouse Number-to-ED-Number Indexes. Paperbound semiannual indexes are available for January-June and July-December each year from GPO. An annual cumulation of both resumes and indexes is available from the CIJE Publisher. Each monthly issue announces approximately 1,000 items.

RIE is directed at the entire educational community, e.g., school administrators, teachers, supervisors, school board members, educational researchers, students, librarians, professional educators, parents, etc.

RIE is available from the U.S. Government Printing Office, Washington, DC 20402. The current annual subscription price for the journal in the U.S. is $94 per year, exclusive of the semiannual cumulative index.

2. ***Current Index to Journals in Education*** **(CIJE)**

CIJE is a paperbound monthly (12 issues per year) index journal that announces journal articles from over 700 education and education-related journals. CIJE is made up of a main entry section, consisting of bibliographic information and up to 50-word annotations for most articles; an index section, consisting of separate Subject and Author indexes; and a journal contents section arranged by journal title and showing the articles accessioned from each journal issue. Semiannual cumulations are available (cumulating both the announcement section and indexes). Each issue announces approximately 1,500 items.

CIJE is directed at the entire educational community.

CIJE is available currently from Oryx Press (for current address, always consult the *ERIC Directory* or RIE). The current annual subscription price for the journal in the U.S. is $225 per year, exclusive of cumulations.

3. ***Thesaurus of ERIC Descriptors***

The *Thesaurus of ERIC Descriptors* contains the basic vocabulary used by the ERIC system for the indexing of documents and journal articles. It contains 10,000 vocabulary terms, including approximately 5,600 Main Terms and 4,400 Synonyms cross-referenced to the Main Terms. Scope Notes (definitions) or parenthetical qualifiers are provided for all non-obvious terms. Hierarchical and other relationships among terms are indicated by the standard "*Narrower Term*," "*Broader Term*," "*Related Term*" notations. The postings count (i.e., the number of documents/articles to which each descriptor has been assigned) is also included.

The *Thesaurus* is maintained and updated regularly by the ERIC Facility, largely on the basis of input from the ERIC Clearinghouses and the 29-member nationwide Vocabulary Review Group (**see Section VIII, Part 1**, for details). New terms and changes are announced in the back sections of RIE and CIJE. A "Working Copy" is produced periodically by the Facility for the use of the Clearinghouse indexers. The *Thesaurus* is formally published (at least quadrennially) for public sale by the CIJE Publisher.

4. *ERIC Identifier Authority List* (IAL)

The *ERIC Identifier Authority List* is a semi-controlled list of approximately 44,000 words and phrases authorized for subject-indexing use, but which, unlike Descriptors, do not appear in the vocabulary of the controlled *ERIC Thesaurus*. Identifiers are usually proper nouns (e.g., names of people, projects, geographic locations, organizations, tests, literary works, computer programs), which because of their nearly infinite numbers, are generally not appropriate for Thesaurus consideration; however, they can also be generic concepts appearing infrequently or newly in the ERIC literature and under consideration for Descriptor status.

The *IAL*, maintained by the ERIC Facility, is a total list of the *preferred* Identifier forms in the ERIC database and serves as a companion volume of the *ERIC Thesaurus*. It is presented in two displays: a main *Alphabetical Display* of preferred Identifiers (A to Z) and the postings of each term; a supplemental *Category Display* listing the Identifiers alphabetically within 20 broad categories (e.g., laws/legislation, science & technology, tests/testing). The two displays are available separately from the ERIC Facility. A one-volume version is also available from the commercial CIJE Publisher, beginning in 1992.

5. *ERIC Database in Machine-Readable Form*

a. Magnetic Tapes (ERICTAPES)

ERICTAPES are magnetic tape copies of the files of bibliographic data assembled by the ERIC System. A number of different files, in a variety of formats, are offered by the ERIC Facility. The most popular files are the sequential Master Files containing the records announced in *Resources in Education* and in *Current Index to Journals in Education*; however, the inverted subject index files and the *Thesaurus* file have also been widely disseminated.

An ERIC Digest Online (EDO) tape is available containing regular bibliographic records for ERIC Digests each followed by the complete full text of the Digest described.

The files are made available on 9-track tape reels (600-, 1200-, or 2400-foot, as appropriate), at packing densities of either 1600 BPI or 6250 BPI. The tapes are unlabeled and in IBM Operating System (OS) format in EBCDIC code. Both "Upper Case Only" and "Upper and Lower Case" character sets are offered.

Detailed information on the various files, formats, and ordering options, along with price lists, can be obtained from the ERIC Facility Contractor.

b. *Online Files*

Private sector vendors of online access to bibliographic database files obtain copies of the ERIC database and its updates by subscribing to "ERICTAPES" from the ERIC Facility.

These files are then mounted on large mainframe computers and the public may purchase access to them, using the vendor's proprietary search and retrieval software. All that is needed is a computer terminal equipped with a modem. Charges are usually based on amount of use, that is, connect time (e.g., $35/hr.) and number of citations printed (e.g., $.010 per "hit").

The three major domestic online vendors of the ERIC database are: BRS, DIALOG, and GTE Education Services. In addition, many universities also provide ERIC online services to their faculty and students. Current addresses and telephone numbers for all commercial online vendors can be found in the *Pocket Guide to ERIC*. Current addresses and telephone numbers for all non-profit providers of ERIC online services can be found in the *Directory of ERIC Information Service Providers.*

c. *CD-ROM Systems*

Private sector vendors of stand-alone CD-ROM systems offering the ERIC database obtain copies of the ERIC database and its updates by subscribing to "ERICTAPES" from the ERIC Facility.

These files are then converted to CD-ROM files and copied in quantity. The public may purchase a subscription to the ERIC database on one or two "archival" discs, supplemented (usually quarterly) by a regularly-updated "current" disc, usually containing data for most of the last decade. All that is needed for use is a microcomputer equipped with a CD-ROM data disc drive.

Charges vary among vendors, but are generally in the neighborhood of $500 per year, with no additional charges based on usage.

The major domestic CD-ROM vendors of the ERIC database are: DIALOG and SilverPlatter. Current addresses and telephone numbers for all CD-ROM vendors can be found in the *Pocket Guide to ERIC*.

6. Document Reproductions

a. Microfiche

A microfiche is a sheet of microfilm approximately 4" x 6", on which up to 98 pages of text are reproduced (at 24X reduction). Only the data on the header strip of a microfiche (containing accession number, title, author, etc.) are eye-legible. A special enlarging microfiche reader is necessary to read the page images; a microfiche reader/printer is necessary to blowback full size paper copies of the document pages; a microfiche duplicator is necessary in order to prepare duplicate microfiche.

Documents are announced in RIE at one of three possible "Levels":

(1) Level 1: documents are available in both microfiche and reproduced paper copy;

(2) Level 2: documents are available in microfiche (and will be available in the archival media that succeed microfiche), but are not available in reproduced paper copy;

(3) Level 3: documents are not available at all from EDRS, but an alternate source of availability is cited in the RIE announcement.

Less than 3% of the items announced in RIE are Level 3; all others may be obtained in microfiche form from EDRS.

A single title that will fit on five microfiche or less (i.e., 480 pages or less) costs $1.16. The price increases at a rate of $0.25 for each additional microfiche required (i.e., 96 page increment or less). Standing orders to obtain the entire ERIC document collection on microfiche are available from EDRS for approximately $2,000 per year.

EDRS prices are subject to change. Users should always check the latest RIE or EDRS Order Form to determine current prices.

b. *Paper Copy (PC) Reproductions*

Paper Copy refers to a paper reproduction (usually at 100% of original size) of an original document. All Level 1 documents announced in RIE (about 85% of the announcements) are available from EDRS in paper copy.

Paper copy reproductions are sold on a graduated scale dependent on size at a rate of $3.20 per 25 page (or less) increment. See EDRS Order Form in most recent issue of RIE for current price.

7. *Journal Article Reprints*

ERIC provides for document delivery of the documents announced in *Resources in Education* (RIE), but does not itself provide for delivery of copies of the journal articles announced in *Current Index to Journals in Education* (CIJE). Instead, ERIC relies on private journal article reprint services that have established mechanisms or relationships for reimbursing journal publishers for the photocopying of their usually copyrighted material. (Users also have the option, of course, of consulting such articles in the collections of academic libraries, or other research libraries that subscribe to them.)

Two of the most well-known reprint services are: (1) University Microfilms International (UMI), Article Reprint Service; and (2) Institute for Scientific Information (ISI), Genuine Article Service. Charges are typically around $15.00 per article. The addresses and telephone numbers of the above journal article reprint services can be found in the *Pocket Guide to ERIC*.

8. ERIC Clearinghouse Publications

a. Monographs, Reviews, Bibliographies, Syntheses, etc.

In addition to collecting the literature of education for announcement in RIE and CIJE, the ERIC Clearinghouses analyze and synthesize the literature into research reviews, bibliographies, state-of-the-art studies, interpretive studies on topics of high current interest, and many similar documents designed to meet the information needs of ERIC users. These publications are announced in RIE and are available in the ERIC microfiche collections provided by the ERIC Document Reproduction Service (EDRS).

Annually, the ERIC Facility prepares a bibliography that lists and indexes all the ERIC Clearinghouse publications announced during the prior year. Typically, this publication contains around 200 entries per year. Annually, ACCESS ERIC prepares a catalog of all ERIC Clearinghouse publications (from all prior years) that are still in-print and available from the Clearinghouses.

b. Digests

ERIC Digests are a specific type of ERIC Clearinghouse publication that has become increasingly popular with the user population during the last few years and that has therefore been given more emphasis recently in Clearinghouse publication planning.

ERIC Digests are short reports (1,000-1,500 words on one or two pages) on topics of current interest in education. They are designed to provide an overview of information on a given topic, plus references to items offering more detailed information. They are reviewed by experts and content specialists in the field. They are targeted for teachers, administrators, policymakers, and other busy practitioners needing rapid access to brief, highly synthesized, but also authoritative, information on a specific problem area.

Approximately 160 Digests are produced by the ERIC

Clearinghouses each year. Through 1991, over 1,200 Digests have been produced. **(See ERIC Ready Reference #10(A-B).**

The full text of selected Digests is made available for online access via certain vendors, e.g., DIALOG, GTE Education Services, etc. (See Publication Type Code 073).

9. Reference Tools Providing Access to the ERIC Database (ERICTOOLS)

The ERIC Facility prepares a variety of tools for the internal use of the organizations engaged in building the ERIC database. In some cases, the internal reference tools are of interest to heavy users of the ERIC database or to organizations engaged in similar database-building activities. In response to public interest, the internal ERIC publications listed below are made available in limited quantities for purchase via the ERIC Facility's self-sustaining ERICTOOLS program:

a. *Clearinghouse Number to ED Number Cross-Reference List*;
b. *Contract/Grant Number Index* (not currently scheduled);
c. *ERIC Processing Manual* (EPM);
d. *ERIC Source Directory*;
e. *ERIC Title Index* (RIE only);
f. *Identifier Authority List* (IAL);
g. *Report Number Index* (not currently scheduled).

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Section II: Acquisitions

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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ACQUISITIONS

SUMMARY OF SIGNIFICANT RULES

1. Clearinghouses have the basic responsibility for acquiring those documents that deal with their defined subject scope areas (**see Appendix A**). Clearinghouse efforts are supplemented by those of Central ERIC (OERI and ED documents) and the ERIC Facility (Federal, state, and international documents).

2. An acquired document may be selected or rejected, but an unacquired document never receives the benefit of an informed evaluation. Therefore, while reasonable selectivity should be exercised in acquiring documents, if potential education-relatedness exists and resources permit, it is better to acquire than to make a judgment sight unseen.

3. Arrangements that cause documents to be received automatically, whenever they first become available, are generally more productive and more economical than on-demand after-the-fact efforts; in addition, they result in more timely receipt of documents.

4. Exchange arrangements must be monitored to ensure their effectiveness (i.e., are the documents bargained for being received?) and their fairness (i.e., does ERIC receive as much as it gives; is there a quid pro quo?).

5. Each Clearinghouse is responsible for establishing basic bibliographic control over the documents that it has on-order or in-process.

6. Clearinghouses are responsible for obtaining signed Reproduction Release Forms for all documents that they enter into the ERIC system (or for determining from the *ERIC Acquisitions Arrangements* (EAA) list that a signed Blanket Reproduction Release Form is on file that covers the document in question). Exceptions are documents produced by or funded by the Federal government, which may be processed without obtaining such release forms. Reproduction Releases often are best obtained during the original acquisition process.

7. Department of Education contractor reports may be considered released for processing by their respective monitors if and when they are received. It is *not* necessary for the Clearinghouse to verify that such documents have been officially released.

8. Whenever possible, documents and journals should be obtained on a complimentary or free basis (citing the many advantages of being in the ERIC system). Documents and journals should be purchased only when they cannot be obtained in any other way and when their value to the system justifies the expense.

9. Documents that are available only from sources outside the United States may be acquired, but they must meet more stringent selection criteria than more easily obtained domestic documents.

10. Any ERIC component may make a recommendation that a given journal be covered by CIJE; however, responsibility for the decision to cover or not rests with the Clearinghouse (subject to monitor's concurrence) to which the journal would be assigned for processing.

11. All in-process documents held by Clearinghouses, but not yet processed and transmitted to the Facility, must be reported at least on a monthly basis (preferably more frequently) to the ERIC Facility for inclusion in the *Acquisitions Data Report* (ADR) title file, so that effective system-wide duplicate checking can take place using this file.

II. ACQUISITIONS

A. Introduction

Productive use of the ERIC database is dependent upon the quality and comprehensiveness of the input to it. Acquisitions is the critical first step in building the database. The acquisitions activity provides the raw material for all the functions that follow: selection; processing (cataloging, indexing, abstracting); announcement; retrieval; and dissemination.

In the ERIC system, all components play a role in acquisitions. This section covers the responsibilities of each of these components, the various techniques used for acquiring documents, and the ways that balance and coordination are achieved among distant elements of the system.

B. Acquisitions Responsibilities (by System Component)

Four separate acquisitions efforts go on concurrently within the ERIC system. All work cooperatively to provide comprehensive coverage of the report literature of education (for announcement in RIE) and of the journal literature of education (for announcement in CIJE).

1. Central ERIC

Central ERIC establishes the basic policies governing all acquisitions work. In addition, Central ERIC has responsibility for the acquisition of reports prepared under contract or grant for the U.S. Department of Education and its offices. Central ERIC controls the overall number of journals covered by CIJE.

2. Clearinghouses

The ERIC Clearinghouses have basic responsibility for establishing document acquisitions programs comprehensively covering their assigned subject scope areas. Each Clearinghouse has a designated "acquisitions" staff member responsible for acquiring documents. Responsibility for subscribing to journals within the Clearinghouse's scope of interest may also rest with this person or may be shared with a CIJE "specialist."

3. ERIC Facility

The ERIC Facility has basic responsibility for the Federal area (outside of the Department of Education); for State Departments of Education; for certain foreign, international, and inter-governmental arrangements; for major education associations and foundations; for general education publishers; and for systemwide coordination to avoid duplication of effort.

4. CIJE Publisher

While the Clearinghouses have responsibility for identifying, acquiring, evaluating, and making recommendations concerning coverage for all new education-related journals, the CIJE Publisher coordinates all additions to coverage and, with Central ERIC, determines the overall number of journals to be covered.

C. Acquisitions Methods and Techniques

1. General

Among the various technical processing tasks involved in controlling a literature and building a database, acquisitions is unusually dependent for its success on resourcefulness, inventiveness, and industry, and less dependent on the exact following of written policies and procedural rules (such as presented here). This is because there is no single best way to acquire documents. The opportunities present themselves in a multitude of guises. They must be seized rapidly and with whatever accommodations and adjustments the situation requires. The staff member responsible for acquisitions must be determined, accommodating, able to solve problems, far-sighted, creative, and flexible when necessary, in order to ensure a steady inflow of potentially valuable documents.

The acquisitions process always contains an element of selection in that not everything can be obtained, priorities must be set, decisions must be made even as to what to go after. Nevertheless, a cardinal rule of the acquisitions process is, if resources permit, it is better to obtain a document than not. Once obtained, a document may be selected or rejected, but if it is never obtained in the first place, ERIC personnel never get a chance to exercise any selective or critical judgment with respect to it.

2. Acquisitions Tools

A wide variety of reference tools are useful in acquisitions work. Most prominent and numerous are the tools to be scanned in order to learn of promising new reports and documents, e.g.: press releases; newsletters of professional associations; professional journals; catalogs and flyers of publishers; other abstract journals; bibliographies and references included in documents and articles already selected for RIE or CIJE; calendars and programs of upcoming conferences and meetings; directories that list organizations likely to be sources of relevant documents; research-in-progress compilations that pinpoint future producers, etc.

An active acquisitions effort typically builds up an extensive reference collection and file of sources and also ensures the continued regular receipt of numerous serial publications that are regularly scanned. Examples are given in the Clearinghouse and Facility parts of this section.

3. Form Letters

Because of the large number of contacts required by the acquisitions process, it is often necessary to rely on form letters, or at least standard language which has been developed to make an optimum presentation of the requester's position, the advantage of giving a document to the ERIC system, etc., and which can be incorporated into the body of individual letters. With good word processing techniques and a personalized inside address and salutation, a form letter can appear quite "customized" and can be used in place of individual letters. There will, of course, always be instances in which original letters must be written. Nevertheless, form letters definitely have a time-saving role to play in acquisitions work, particularly in the initial contact phase. Most Clearinghouses make use of a variety of form letters to cover different situations. Examples are discussed in the Clearinghouse and Facility parts of this section. (**See Figures II-10 and II-11** at the back of this Section).

4. Methods of Acquiring Documents

a. Unsolicited Receipts

An active acquisitions program is characterized by continuous personal and correspondence efforts to keep ERIC's document needs before potential contributors. A number of Clearinghouses have developed acquisitions brochures focusing on their specific areas of interest. These brochures were developed for distribution at conferences and for inclusion in mailing packets. Brochures, such as *Submitting Documents to ERIC* and *All About ERIC*, and the front/rear matter to *Resources in Education*, also contain general information concerning ERIC's desire for educational literature and instructions for contributing documents. These and other efforts result in the receipt of documents which were never specifically solicited. Such receipts occur at all levels of the network, including EDRS, and must be routed to the appropriate Clearinghouse for processing.

Central ERIC and EDRS routinely forward such documents to the ERIC Facility for assignment to the appropriate Clearinghouse. The Clearinghouses also transfer documents among themselves, as necessary.

This is one of the easiest ways to acquire documents, though not the most reliable. As public awareness of ERIC grows, more documents come into the system in this manner. Thank you letters and follow-up letters to contributors of this type sometimes result in continuing submissions or even formal arrangements.

b. Automatic Distribution

The most productive kind of acquisitions arrangement for the ERIC system is one where Clearinghouses or the Facility arrange to be placed on an organization's mailing list to get all (or classes) of publications "automatically," as issued. The Clearinghouses and the Facility establish as many automatic acquisitions arrangements as possible. Such arrangements ensure early receipt of an organization's relevant material, usually on initial distribution. Where a request for a specific title nets one document, a successful request to be put on a mailing list may net many times more documents over time.

All formal acquisitions arrangements should be documented and reported to the ERIC Facility (**see Section II.F.2.b.(1)**). Documentation should include all correspondence exchanged, together with the signed Blanket Reproduction Release form (if it is necessary). A list of all such arrangements is cumulated annually by the Facility in the *ERIC Acquisitions Arrangements* (EAA) list. All of these arrangements must be regularly monitored to ensure that they are working and to determine which arrangements may have ceased to be productive.

c. Requests for Specific Titles

Specific titles of documents relevant to the field of education come to the attention of acquisitions personnel by a variety of channels: requests from users, the public, or other staff members; news releases, newsletters, and other rapid announcement sources; conference announcements and programs; conventional media regularly read or scanned, e.g., reviews, professional and association journals, newspapers/radio/TV; library acquisitions tools, e.g., *Publishers Weekly*; other abstract journals, e.g., *Government Reports Announcements*; acquisition lists of certain libraries and information centers, bibliographies in received documents, etc.

The acquisition of specific titles usually involves an individual written request (and enclosed reproduction release form) directed to the author, sponsor, publisher, or other source. Sometimes a modified form letter (citing the specific title desired) can be used; sometimes a telephone call can be employed. Sometimes a request for a single title will lead to an offer of other related publications or an offer to send future publications as issued. For the most part, however, requests for specific titles are a one-for-one proposition, i.e., one successful request nets one title. All requests should be, at least initially, for complimentary or review copies, relying on the many advantages ERIC has to offer to persuade sources to contribute their output free of charge.

Records should be kept of each title so requested, in order to avoid duplicate requests (irritating to the source and wasteful of effort), and in order to be able to respond knowledgeably to all inquiries about documents in process. As materials are received and included in the system, the outstanding request or on-order file should be purged.

d. Purchase

While most documents can be acquired for ERIC free of charge or via exchange, some few must be purchased. A prime example of valid documents that must be purchased are those acquired from the U.S. Government Printing Office (GPO). Other material is available from a wide variety of commercial or non-profit publishers (or authors) who have either copyrighted the document in question or otherwise restricted its reproduction in order to be able to sell it to defray publishing expenses.

Purchases may be made when necessary to obtain a valuable and useful title; however, they should always be scrutinized carefully and made deliberately, with full awareness of the ERIC selection criteria (enumerated in **Section III**). If a Reproduction Release form (for Level 1 or Level 2 input) cannot be obtained, the document must be entered at Level 3. It is not advantageous to the RIE journal, the microfiche collection, or the system in general, to have an excessive number of non-reproducible Level 3 announcements, where the user must be directed outside the ERIC system for access. Level 3 input into RIE has decreased over the last few years to less than 3%. This seems to be an acceptable level and Clearinghouses should keep this statistic in mind when evaluating their own volume of Level 3 input. (Please note that GPO documents should always enter the system at Level 1 (see **Section I**)).

Two purchasing arrangements that can be used for ordering are:

(1) **Specific Orders**

The same guidelines and observations that apply to the section above on "Requests for Specific Titles" apply equally here. The only difference is that the necessity of paying usually requires completion of a formal "Purchase Order" (or its equivalent, the establishment of an account), or requesting and paying invoices. Procedures for generating "Purchase Orders" are, of course, dictated by Clearinghouse host institutions.

(2) **Standing Orders**

Standing orders are, in effect, subscriptions for all the publications (or relevant classes of publications) produced by a given source. Standing orders are only possible in those instances where the source (or jobber) offers the service. Standing orders often have the advantage of reducing the time to acquire a document, cutting paperwork, lowering overall costs, and most importantly, assuring comprehensive acquisitions. An example of a standing order would be the ERIC Facility's arrangement with UNIPUB (the U.S. agency for UNESCO publications).

e. General Solicitation

The solicitation notices contained in RIE and in the various Clearinghouse brochures are essentially undirected. They are not addressed to particular institutions, nor do they request particular documents. There are many opportunities during the year, however, to direct similar general solicitations to specific organizations and activities. In such situations, the solicitation is not typically for specific documents, but rather for everything that the activity produces. The purpose is not to try to set up a permanent distribution list arrangement, but rather to try to take advantage of a temporary and often transient opportunity.

Professional meetings, conferences, symposiums, seminars, workshops, colloquiums, etc., are good examples of such opportunities. ERIC acquisitions staff who learn of relevant activities of this type (particularly those that are geographically close) may participate at various levels, e.g., write for proceedings and papers; attend the activity; participate in the program; exhibit at a booth, etc.

Whatever level of participation is chosen, the acquisitions person involved should take every opportunity to publicize ERIC and make its document needs known, e.g.: distribute name cards; hand out brochures and materials describing the ERIC system and the need for contributor input; request preprints or copies of papers from individual speakers, session leaders, or the conference director.

Persons representing ERIC at such activities are strongly urged to remember to solicit for the system in general and not just for their own component of the system. Sometimes the solicitation for conference papers can be a cooperative undertaking between the host association and a Clearinghouse on behalf of the ERIC system. For example, the annual American Educational Research Association (AERA) meeting papers are collected by the ERIC Clearinghouse on Tests, Measurement, and Evaluation (TM) for assignment to other ERIC components, as appropriate.

f. Exchanges

Exchanges are a variation of automatic distribution. Most of ERIC's solicitations are for free copies of publications (with ERIC offering in return the advantages of announcement, indexing, inclusion in the machine-readable database, reduction to microfiche, and constant availability). Sometimes, however, *quid pro quo* exchanges may be the best way to acquire publications from certain organizations, e.g., foreign ministries of education. The Clearinghouses may offer their own newsletters, bibliographies, and other publications. Exchanges should be regularly and carefully monitored to ensure that ERIC is receiving the desired publications and that what is being received is a fair exchange for the ERIC material being sent.

g. ERIC Partners

ERIC Partners (defined in the Introduction and in the Glossary), while usually heavy users of ERIC, may or may not also involve an acquisitions arrangement. Clearinghouses should be alert to the possibility of using a Partner to facilitate the acquisition of documents from the Partner's host organization or from their constituencies.

D. Central ERIC Role in Acquisitions

1. Policy Setting, Guidance, Coordination, Monitoring

As with all phases of the ERIC program, Central ERIC sets the basic acquisitions policies to be followed. Central ERIC determines what kinds of documents are suitable for RIE and has formalized these decisions in the selection criteria stated in Section 3, "Selection." Central ERIC approves the scope of interest statement of each Clearinghouse (**See Appendix** A), thereby establishing those areas of the field of education for which each has responsibility. The format and frequency of the basic duplicate checking tools, e.g., *Title Index*, *Acquisitions Data Report*, *ERIC Acquisitions Arrangements*, used in acquisitions are dictated by Central ERIC. The statistical and narrative reports required of each element of the network are established by Central ERIC (see the **ERIC Administrative Procedures Manual**). Central ERIC monitors all network activities, including acquisitions, as to the adequacy of performance and compliance with contract terms and conditions.

Each network component has a designated monitor at Central ERIC with whom to discuss problems. In addition, Central ERIC designates one of its staff members to be overall Acquisitions Coordinator. Both are available to acquisitions staff to answer questions concerning document acquisitions, reproducibility, selection, copyright, PRIORITY documents, and scope overlap.

Contact between Central ERIC and the ERIC Facility concerning acquisitions is regular and ongoing since Department of Education documents flow on a routine basis from the former to the latter. There are frequent requests for information concerning the receipt or status of particular PRIORITY documents. In addition to actual documents, many notices of publications, conferences, and sources of educational materials come to the attention of Central ERIC staff and are passed on to the Facility for action or routing to appropriate Clearinghouses.

2. Acquisitions Responsibilities

Central ERIC has reserved to itself the acquisition of formal publications and contractor reports of the Department of Education. It also negotiates arrangements for receipt of publications from certain foreign institutions and several international organizations (sometimes offering complimentary distribution of RIE in exchange). All reports and documents acquired by Central ERIC, whether actively or on an unsolicited basis, are forwarded to the ERIC Facility for assignment to the appropriate Clearinghouses. One of the important procedural objectives in handling acquisitions centrally (by either Central ERIC or the ERIC Facility) is to avoid multiple solicitations from various ERIC network components, all converging on (and confusing) the same government agencies or foreign organizations.

3. PRIORITY Documents

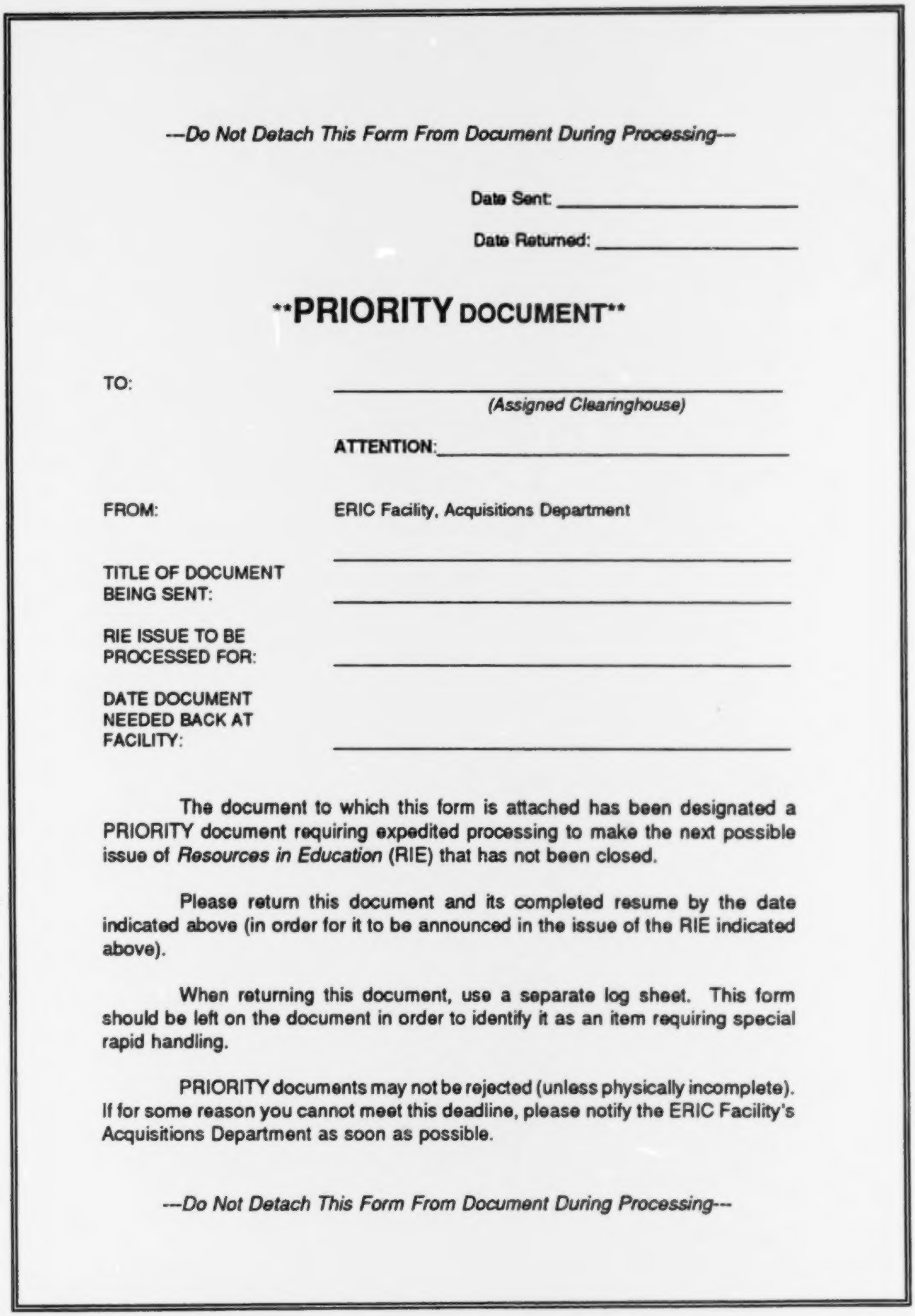
Central ERIC occasionally designates certain important documents, as "PRIORITY Documents." A special identifying notice is affixed to these documents (see **Figure II-1**). Questions or problems concerning reproducibility or copyright, if any, are resolved before sending them to the Facility for Clearinghouse assignment, so that PRIORITY documents can proceed as rapidly as possible through the system.

There are three classes of document handling: "Routine" documents, Department of Education Documents, and "PRIORITY" documents. Routine documents are handled according to a Clearinghouse's normal, regular cycle. Department of Education Documents are simply supposed to be the next routine documents processed, i.e., supposed to be put at the top of the routine pile. "PRIORITY" status assigned by Central ERIC indicates to the Clearinghouse that processing must take place on an expedited basis as quickly as necessary to ensure that the document appears in the earliest possible issue of RIE. (This can be determined from the RIE Master Schedule.) If the deadline of an issue is close, this can sometimes require virtually 24-hour turnaround. The handling of PRIORITY documents is described in detail in Section IV. Clearinghouses are notified in advance by telephone before a PRIORITY processing requirement is imposed. PRIORITY documents may not be rejected.

E. Clearinghouse Acquisitions Efforts

1. General Mandate

The primary responsibility in ERIC for acquisitions and the procurement of documents for the system has always been and continues to be with the ERIC Clearinghouses. Each Clearinghouse is responsible for ensuring a steady flow into RIE and CIJE of high-quality documents and journal articles within its specific scope of interest area.



---Do Not Detach This Form From Document During Processing---

Date Sent: ____________________

Date Returned: ____________________

****PRIORITY DOCUMENT****

TO: ______________________________
(Assigned Clearinghouse)

ATTENTION: ______________________________

FROM: ERIC Facility, Acquisitions Department

TITLE OF DOCUMENT BEING SENT: ______________________________

RIE ISSUE TO BE PROCESSED FOR: ______________________________

DATE DOCUMENT NEEDED BACK AT FACILITY: ______________________________

The document to which this form is attached has been designated a PRIORITY document requiring expedited processing to make the next possible issue of *Resources in Education* (RIE) that has not been closed.

Please return this document and its completed resume by the date indicated above (in order for it to be announced in the issue of the RIE indicated above).

When returning this document, use a separate log sheet. This form should be left on the document in order to identify it as an item requiring special rapid handling.

PRIORITY documents may not be rejected (unless physically incomplete). If for some reason you cannot meet this deadline, please notify the ERIC Facility's Acquisitions Department as soon as possible.

---Do Not Detach This Form From Document During Processing---

FIGURE II-1 - PRIORITY Document Form

In order to qualify for RIE, documents must: (1) fall within the field of education, broadly defined; (2) meet the criteria set forth in Section 3, "Selection," with regard to physical characteristics (i.e, size and legibility), content, and quality. Documents that fail to satisfy the basic requirements are not to be submitted for RIE, but may be kept for local collections (unfunded by ERIC), if desired. *If a document is education-related, but falls outside the scope of interest of the Clearinghouse considering it, it should be transferred to the appropriate Clearinghouse for evaluation, rather than discarded.*

2. Kinds of Documents and Journal Articles to Be Acquired

The following are examples (alphabetically sequenced) of the types of education-related documents that should be acquired as candidates for RIE:

- bibliographies, annotated bibliographies;
- conference papers;
- evaluation studies;
- feasibility studies;
- instructional materials/curriculum materials; lesson plans; teaching units
- legislation and regulation;
- manuals, guides, and handbooks;
- monographs, treatises;
- opinion papers, position papers;
- proceedings;
- program/project descriptions;
- research reports/technical reports;
- resources guides;
- speeches and presentations;
- state-of-the-art studies;
- statistical compilations;
- taxonomies and classifications;
- teaching guides;
- tests, questionnaires, measurement devices;
- vocabularies, dictionaries, glossaries, and thesauri.

The following types of journals should be acquired for coverage by CIJE:

- **Education Journals**

  These are journals totally devoted to education subjects. High quality, "core," education journals should always be selected for comprehensive, cover-to-cover indexing of all substantive articles. Second-tier journals, not judged to be "core" publications, may, at the discretion of the Clearinghouse, be given selective coverage of only those articles judged to be of sufficient quality. However, the preference is for education journals to be covered comprehensively for all articles.

- **Education-Related Journals**

  These are journals, usually subject-specific, that are not totally devoted to education, but that contain occasional education-related articles. High quality journals in this category should have all education-related articles selected. Second tier journals in this category may, at the discretion of the Clearinghouse, be covered selectively for those articles relevant to education. However, the preference is to cover comprehensively all education-related articles in education-related journals.

- **"One-Shot" Articles (See also Section II.G)**

  These are journal articles relevant to education, but contained in journals that do not ordinarily cover education topics and not regularly covered by CIJE. Such articles are discovered in a variety of ways, sometimes fortuitously, and may be selected for CIJE on an *ad hoc* basis.

ERIC would like to be given the opportunity to examine virtually any document dealing with any aspect of education. The ERIC audience is so broad (encompassing school board members, teachers, administrators, librarians, researchers, media specialists, students, parents, counselors, and every other variety of educator) that it must collect a wide variety of documentation in order to satisfy its users.

3. Sources of Documents

The Clearinghouses are responsible for acquiring documents within their scope areas issued by all organizations, except those reserved to Central ERIC (see **Section II.D**) and to the ERIC Facility (**see Section II.F**).

Some documents arrive at the Clearinghouses unsolicited, and others are received from the ERIC Facility. For most acquisitions, however, the Clearinghouses must rely on such contacts as: appropriate professional societies and academic institutions; people known to be working in the field; specific state or local officers responsible for programs relevant to the Clearinghouse subject area; foundations or other organizations sponsoring education projects; publishers; institutes; speech-makers; information centers; and a wide variety of other individuals and organizations concerned with education.

The following successful acquisitions strategies for different classes of contributors have been reported by the Clearinghouses:

a. Previous Document Contributors

Send letters to "automatic contributors," thanking them for past cooperation and asking them to continue to contribute documents. Contact authors of Clearinghouse Information Analysis Products and other Clearinghouse publications, reminding them that the Clearinghouse is interested in reviewing appropriate documents that may come to their attention. Send complimentary microfiche to contributing institutions/authors.

b. Conferences

Conferences can be a lucrative source of documents, and Clearinghouses should be alert to all conferences in their subject area. In addition, Clearinghouses may coordinate with other elements of the network in covering all papers and products of a large or general conference in their geographic area, later forwarding those outside their own particular subject scope to the Facility for assignment elsewhere in the network. Exemplary arrangements for the collection of conference papers are those established by TM to obtain AERA papers and CG to obtain APA papers. For typical form letters used by Clearinghouses, see **Figures II-11 (A-G)**.

Clearinghouses should be aware of the following methods of obtaining documents from conferences: (1) if an organization collects the papers/speeches at its conferences, request that a set be collected for the Clearinghouse; or (2) suggest that the program committee chairperson endorse a solicitation letter or distribute acquisitions letters and brochures on behalf of the Clearinghouse, or even insert a solicitation notice in the conference program; or (3) ask for a program, mailing list, or directory of participants, and then solicit papers directly from participants.

The *ERIC Calendar of Education-Related Conferences*, prepared annually, lists all conferences in which Clearinghouses will participate that year, including those from which papers will be solicited. It is an essential tool for the coordination of conference-related acquisitions efforts.

c. **Professional Associations**

Obtain mailing lists from professional and/or academic organizations for direct mail campaigns to these individuals. Send special letters to sub-groups of professional organizations, i.e., racial and ethnic sections, women's caucus groups, instructional improvement groups among the various disciplines, etc. Attend meetings, participate in programs, etc.

d. **Academic Institutions**

Use college catalogs or other reference books to identify graduate departments within the Clearinghouse's scope area. After contact, endeavor to establish an automatic arrangement and to obtain blanket permission so that all documents issued by the department are submitted to the Clearinghouse. Hold ERIC workshops in university libraries or education departments, colleges, schools, etc.

e. **Foundations (Sponsoring Education Programs)**

Ask foundations to include a request that grantees submit resulting papers and final reports to ERIC. Supply foundations with ERIC brochures and other literature to distribute to the grantees.

f. **Non-Profit Organizations Concerned with Education**

Send a printout of all documents contributed to RIE and CIJE by the organization in question. Request that all documents still available, but not on the printout, be submitted to ERIC. For a typical form letter, see **Figure II-11(B)**. If the Clearinghouse has a complimentary mailing list, add the organization to the distribution list for ERIC products.

g. **Journal Articles**

Contact editors of appropriate journals for quality articles they have not been able to publish. Because of space limitations, journals can publish only a small number of papers they receive. A number of papers may be rejected, but may meet the ERIC selection criteria. Journal editors can be contacted and asked to include information about ERIC when they send a letter of rejection to an author. The editors can include a sheet which states that ERIC would be interested in reviewing the paper for possible inclusion in ERIC. It should be made clear that announcement in a secondary abstract journal like RIE is not the equivalent of publication in a peer-reviewed primary journal, but may nevertheless serve to preserve useful material.

4. Tools for Use in Identifying Documents to Be Acquired

Clearinghouses utilize a number of reference tools, publications, and other sources to identify specific titles and potential contributors of documents. Such tools include:

- Conference and convention programs (e.g., APA Program);
- Journals, newsletters, newspapers, advertisements, book reviews, and news items should be scanned regularly for relevant titles and names of people or institutions engaged in projects, studies, or grant awards which could produce appropriate documents (e.g., *Education Daily*, *Chronicle of Higher Education*, *Library Journal*).
- Bibliographies, publication lists, catalogs, acquisition lists, etc., can be excellent sources of new titles, and sometimes also provide ordering information (e.g., *Monthly Catalog of U.S. Government Publications*, *UNESCO Publications*, *Congress in Print*.)
- Document reference lists, footnotes, etc. Documents already acquired can often, through their content, lead to other titles or other sources. References contained in Clearinghouse publications can often furnish valuable leads to new documents.
- Staff and client recommendations. Reference inquiries involving documents found not to be in the system should routinely be copied to the acquisitions unit.

Each subject area, and hence each Clearinghouse, has its own major reference tools. Clearinghouse personnel should become familiar with the specific reference tools that best fit their area of coverage and should see that they are represented in their reference collection.

5. Clearinghouse Acquisitions Operations (Typical)

Clearinghouse acquisitions operations differ from one another in procedural detail, forms and files used, recordkeeping, and in other respects. No matter how they are implemented, however, every Clearinghouse acquisitions operation is expected to observe the basic functional steps described below:

a. Using the relevant sources and tools, identify titles that appear to be desirable acquisitions within the Clearinghouse's scope of interest. The acquisition of complimentary copies is always an objective, although items that cannot be obtained free of charge may be purchased, or the Clearinghouse may offer to exchange its newsletters, bibliographies, etc., for documents.

b. Once a title has been identified and has been determined to be within the Clearinghouse's scope of interest, check the *ERIC Acquisitions Arrangements* (EAA) list to determine whether or not the source organization is covered by an acquisitions arrangement with another Clearinghouse or the Facility. If an arrangement already exists between the source organization and another ERIC component, the component having the arrangement should be contacted and coordinated with before any solicitation of documents is done.

c. Check the Clearinghouse local "on-order" file and standard ERIC duplicate checking tools (such as the *Acquisitions Data Report* and the *Title Index*) to determine if the identified items have already been ordered, received, or processed.

d. If the document of interest is from a Federal agency, a State Education Agency (SEA), an OERI Laboratory, or an organization with which the Facility has an acquisitions arrangement, (see EAA list), requests for the document should be made through the Facility.[*] Titles should be requested by using the standard form provided for this purpose by the Facility, the "Clearinghouse Acquisitions Request" (EFF-76). (See **Figure II-10(D)**). This form should be filled out as completely as possible and, where possible, a copy of the citation or document description engendering the request should be attached. The Facility will either obtain the document or let the Clearinghouse know if it is unavailable.

e. After following the above steps, request the document(s), using a form letter, telephone call, or purchase order (whichever is more efficient). An example of a standard form letter is shown in **Figure II-11(A)**. With each solicitation (unless ERIC already has blanket reproduction permission), include a Reproduction Release form and all the bibliographic data available. Some Clearinghouses have found the enclosure of a self-addressed label with requests, and self-addressed envelope with other correspondence, to be very useful in expediting responses.

f. Prepare an "on-order" record for Clearinghouse local files; include title, author, source, price, and date ordered.

g. As documents are received in the Clearinghouse, determine whether they are on-order or have arrived unsolicited. Those on-order should have receipt information entered on the on-order record, or the record should be purged, whichever in-house procedure dictates. Receipt of documents arriving unsolicited should be recorded and all useful correspondence and address information should be preserved. (The use of a self-addressed label helps identify solicited items.) If a document is received from an organization with which another ERIC component has an arrangement, the other component should be informed (copy of title page is suggested.)

h. Upon receipt of a document, acknowledgement of receipt and of acceptance/rejection by card or letter is recommended, but optional. Notifications to contributors vary considerably from Clearinghouse to Clearinghouse (see **Figure II-11(D)**).

i. Evaluate material using prescribed legibility and selection criteria (see **Section III**) and the ERIC Clearinghouse Scope of Interest Guide. Documents inappropriate for the system may be discarded after a suitable retention period that permits the Clearinghouse to respond to author and source inquiries or requests for return. Documents falling within the scope of other Clearinghouses should be transferred to them. (See **Figure II-2** for ERIC Document Transfer Form.) Some Clearinghouses notify contributors when they transfer a document.

j. Make sure a Reproduction Release form (or letter giving reproduction permission) accompanies the document. Resolve any copyright or reproduction release questions. (See **Section II.8**.) Retain all pertinent correspondence.

---

[*] The OERI-sponsored Research and Development Centers are each assigned to a specific Clearinghouse.

If the document does not have a Reproduction Release form, and one is required, Clearinghouses should: (1) Check the EAA List to see if ERIC has been given a Blanket Release; (2) If there is no record of a Blanket Release, then write the author or source organization for a specific release (see **Figure II-11(E)**). (It is advisable to write for releases only after a document has been selected for RIE. Writing prior to selection may result in needless work if the document is later rejected and may prematurely imply acceptance.)

k. Prepare an entry for the *Acquisitions Data Report* (a composite listing of in-process documents, prepared monthly by the Facility, reflecting the acquisitions of all Clearinghouses during the previous six month period). This step requires the Clearinghouse to formally accession the document and to assign a Clearinghouse Accession Number. (Instructions on how to prepare entries for this report are provided in **Section II.H.**) Known rejects and transfers are generally not entered into the ADR, but a Clearinghouse may at its option enter titles for which the selection process is not yet completed.

l. Record name and address of contributor (individual or organization) on mailing label, envelope, or form letter, for later use in distributing complimentary microfiche (provided by the Facility). (See **Figure II-11(F)**.)

NOTE: Complimentary microfiche should *not* be sent to the following kinds of organizations: Congress, Department of Education, Government Printing Office (GPO), or large organizations when the specific name of an individual or department within that organization is unknown.

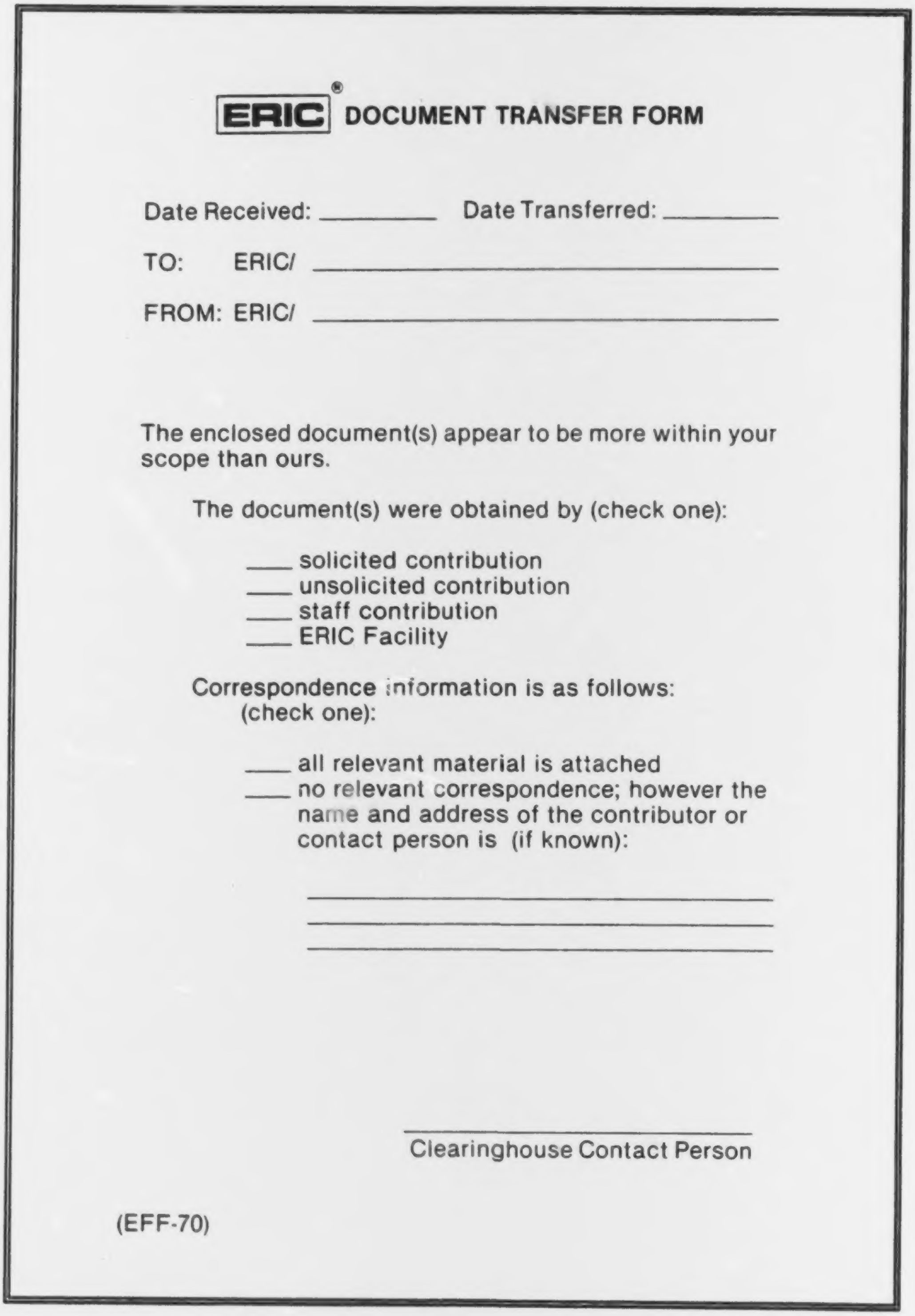
m. Sending rejection notices is optional, unless specifically requested by the contributor. Clearinghouses vary in the methods used to notify contributors of rejected documents. Some use the standard ERIC "Reply Card." Some use their own forms, providing for a variety of messages. An example is shown in **Figure II-11(D)**.

After all the above steps are completed and the document is determined to be of a type suitable for RIE, within subject scope, legible, not a duplicate, and without any unresolved reproduction release problems, acquisitions formerly comes to an end and the document is ready for the cataloging/indexing/abstracting process. Because of the expense of the various intellectual document analysis functions, the acquisitions function must make every effort to eliminate duplicates *before* that stage of processing is reached. (**See Section II-H** for discussion of duplicate checking process.)

6. Department of Education Documents

All reports prepared or sponsored by the Department of Education or OERI should be processed promptly when received, ahead of all other non-OERI routine input and preceded only by PRIORITY documents.

It was formerly required that ED/OERI contractor reports had to be cleared and released by the appropriate project monitor before they could be processed for ERIC. This specific verification of clearance is no longer required. If a copy of a document has been obtained (provided it is not labelled "draft" or "preliminary"), this is considered *prima facie* evidence that the document has been cleared and released. All ED/OERI-prepared or sponsored documents are entered into the database at Level 1.



ERIC® DOCUMENT TRANSFER FORM

Date Received: ________ Date Transferred: ________

TO: ERIC/ ______________________________

FROM: ERIC/ ______________________________

The enclosed document(s) appear to be more within your scope than ours.

The document(s) were obtained by (check one):

____ solicited contribution
____ unsolicited contribution
____ staff contribution
____ ERIC Facility

Correspondence information is as follows:
(check one):

____ all relevant material is attached
____ no relevant correspondence; however the name and address of the contributor or contact person is (if known):

____
____
____

____
Clearinghouse Contact Person

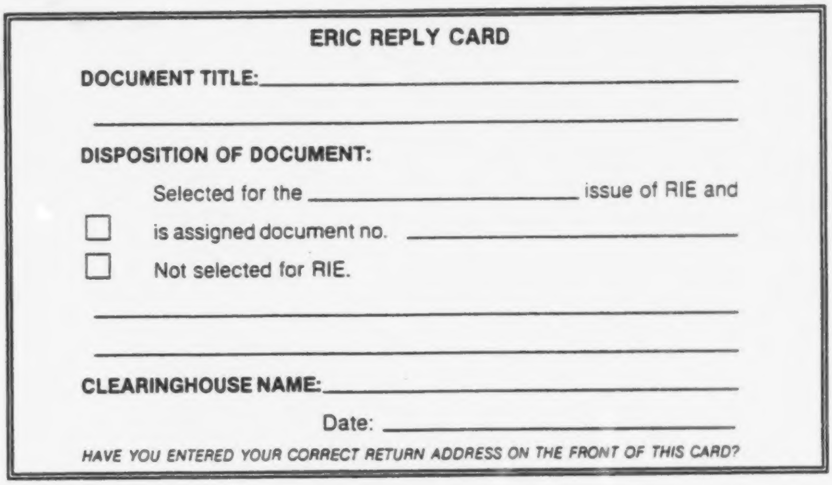
(EFF-70)

FIGURE II-2: Document Transfer Form
[For Clearinghouse-to-Clearinghouse document transfer]

7. Documents Received From the Facility

a. Reply Cards

Reply Cards (see **Figure II-3**) attached to documents received from the Facility require an ED accession number and should, therefore, be detached and returned to the contributor by the Clearinghouse *only when they are not selected*. If selected for RIE, the card remains on the document and is shipped back to the Facility with the document for processing and affixing of the ED number before being detached and mailed.



ERIC REPLY CARD

DOCUMENT TITLE: ____________________

____

DISPOSITION OF DOCUMENT:

Selected for the ____________ issue of RIE and

☐ is assigned document no. ____________

☐ Not selected for RIE.

____

____

CLEARINGHOUSE NAME: ____________________

Date: ____________

HAVE YOU ENTERED YOUR CORRECT RETURN ADDRESS ON THE FRONT OF THIS CARD?

FIGURE 3: ERIC Reply Card

b. PRIORITY Documents

Documents received from the Facility that indicate PRIORITY handling should be evaluated immediately upon receipt. Expedited processing is necessary to ensure announcement of the document in the next issue of RIE to be completed. PRIORITY documents may not be rejected (unless they turn out to be physically defective).

c. ED/OERI Document Selection Report

All OERI documents received from the Facility and *not* selected for RIE must be returned to the Facility with the reason given for their rejection. The OERI Document Selection Report form (see **Figure II-4**) should be used for this purpose. OERI documents that are not accepted for inclusion in the ERIC system will be retained in the permanent OERI Research Library collection.

d. Scope Overlap Notices

When a document overlaps the scopes of two or more Clearinghouses, the Facility assigns the document to the "primary" Clearinghouse and sends a copy of the title page to the "secondary" Clearinghouse(s) with a "Scope Overlap Sticker" affixed (see **Figure II-8**). This procedure serves to notify the "secondary" Clearinghouse that a document they might consider within their scope is being assigned elsewhere.

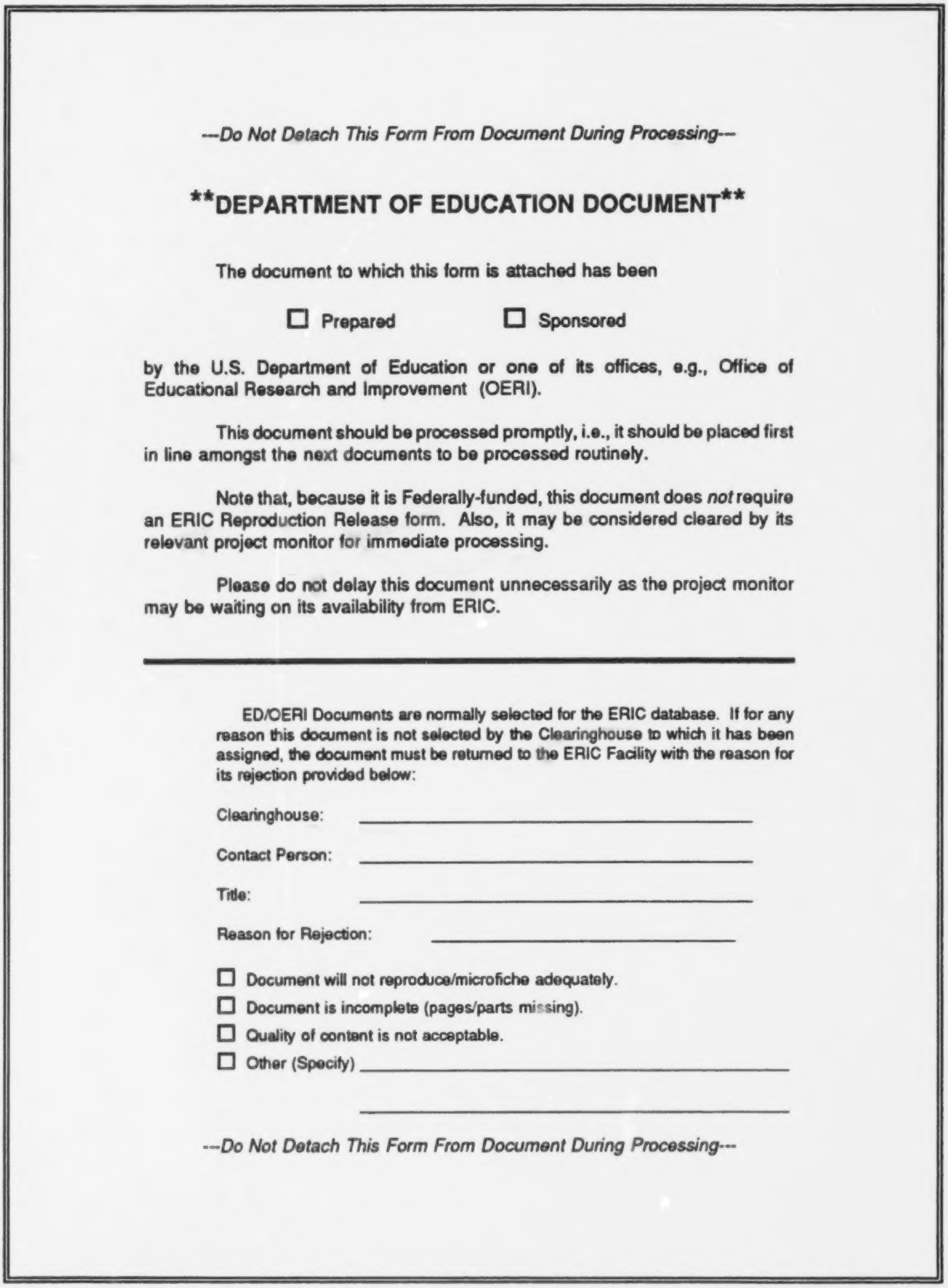
In order to prevent duplicate processing, the "secondary" Clearinghouse should check its records to see if the document is on-order, in-process, or otherwise being considered for acquisitioning.

8. Copyright and Reproduction Release Issues

The Copyright Law requires users such as ERIC to assume that all private sector documents, whether carrying a copyright notice or not, are potentially copyrighted (unless such documents were published without a copyright notice prior to January 1, 1978.) For this reason, unless ERIC already has blanket reproduction permission from the source organization, a signed Reproduction Release Form *must* be obtained for every title selected for the ERIC system. The existence of a letter of transmittal giving ERIC permission to reproduce the report is welcome but is *not* sufficient.

ERIC has designed two standard Reproduction Release Forms for systemwide use--one for individual documents (see **Figure II-5(A)**) and one for blanket permissions (see **Figure II-5(B)**). Clearinghouses are encouraged to develop their own form letters (for examples see **Figure II-11(E)**) to send to contributors along with the release forms, explaining and introducing the form and making it clear that it should be returned to the Clearinghouse with the document. The Blanket Reproduction Release should be negotiated whenever possible in order to eliminate as many individual release forms as possible, thereby saving both effort and time. Clearinghouses obtaining blanket releases should report them for listing in the annual *ERIC Acquisitions Arrangements* (EAA) list.

Beginning in 1993, Reproduction Releases for specific documents will be microfilmed as the last page of the document to which they apply. However, the responsibility for maintaining a permanent file of Reproduction Releases for the period 1966-1992 rests with the Clearinghouses.



---Do Not Detach This Form From Document During Processing---

****DEPARTMENT OF EDUCATION DOCUMENT****

The document to which this form is attached has been

☐ Prepared ☐ Sponsored

by the U.S. Department of Education or one of its offices, e.g., Office of Educational Research and Improvement (OERI).

This document should be processed promptly, i.e., it should be placed first in line amongst the next documents to be processed routinely.

Note that, because it is Federally-funded, this document does *not* require an ERIC Reproduction Release form. Also, it may be considered cleared by its relevant project monitor for immediate processing.

Please do not delay this document unnecessarily as the project monitor may be waiting on its availability from ERIC.

ED/OERI Documents are normally selected for the ERIC database. If for any reason this document is not selected by the Clearinghouse to which it has been assigned, the document must be returned to the ERIC Facility with the reason for its rejection provided below:

Clearinghouse: ______________________

Contact Person: ______________________

Title: ______________________

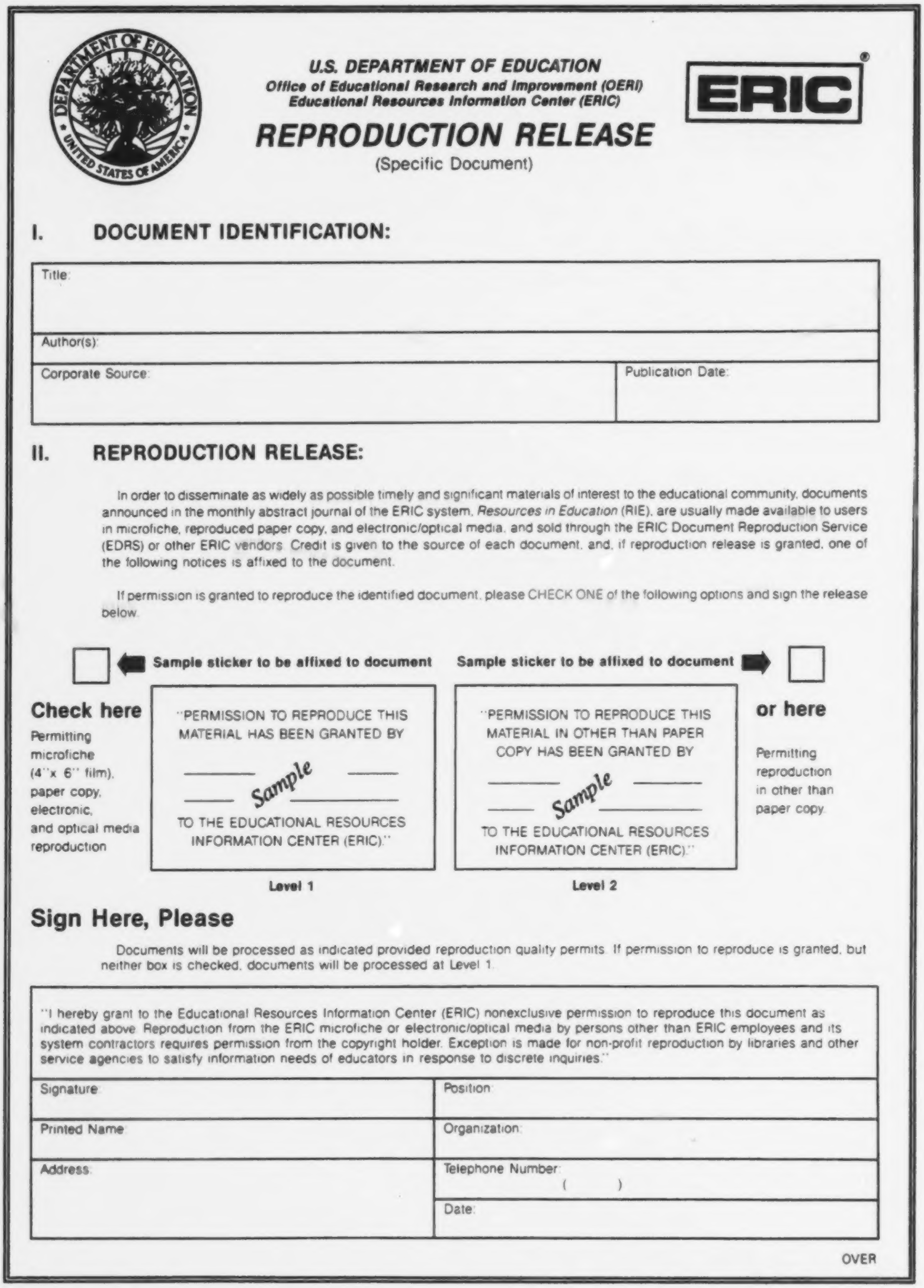
Reason for Rejection: ______________________

☐ Document will not reproduce/microfiche adequately.
☐ Document is incomplete (pages/parts missing).
☐ Quality of content is not acceptable.
☐ Other (Specify) ______________________

____

---Do Not Detach This Form From Document During Processing---

FIGURE II-4: Department of Education Document Handling Form



U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement (OERI)
Educational Resources Information Center (ERIC)

ERIC®

REPRODUCTION RELEASE

(Specific Document)

I. DOCUMENT IDENTIFICATION:

Title:	
Author(s):	
Corporate Source:	Publication Date:

II. REPRODUCTION RELEASE:

In order to disseminate as widely as possible timely and significant materials of interest to the educational community, documents announced in the monthly abstract journal of the ERIC system, *Resources in Education* (RIE), are usually made available to users in microfiche, reproduced paper copy, and electronic/optical media, and sold through the ERIC Document Reproduction Service (EDRS) or other ERIC vendors. Credit is given to the source of each document, and, if reproduction release is granted, one of the following notices is affixed to the document.

If permission is granted to reproduce the identified document, please CHECK ONE of the following options and sign the release below.

☐ ◀ **Sample sticker to be affixed to document**

Check here

Permitting microfiche (4"x 6" film), paper copy, electronic, and optical media reproduction

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Sample

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Level 1

Sample sticker to be affixed to document ▶ ☐

or here

Permitting reproduction in other than paper copy.

"PERMISSION TO REPRODUCE THIS MATERIAL IN OTHER THAN PAPER COPY HAS BEEN GRANTED BY

Sample

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Level 2

Sign Here, Please

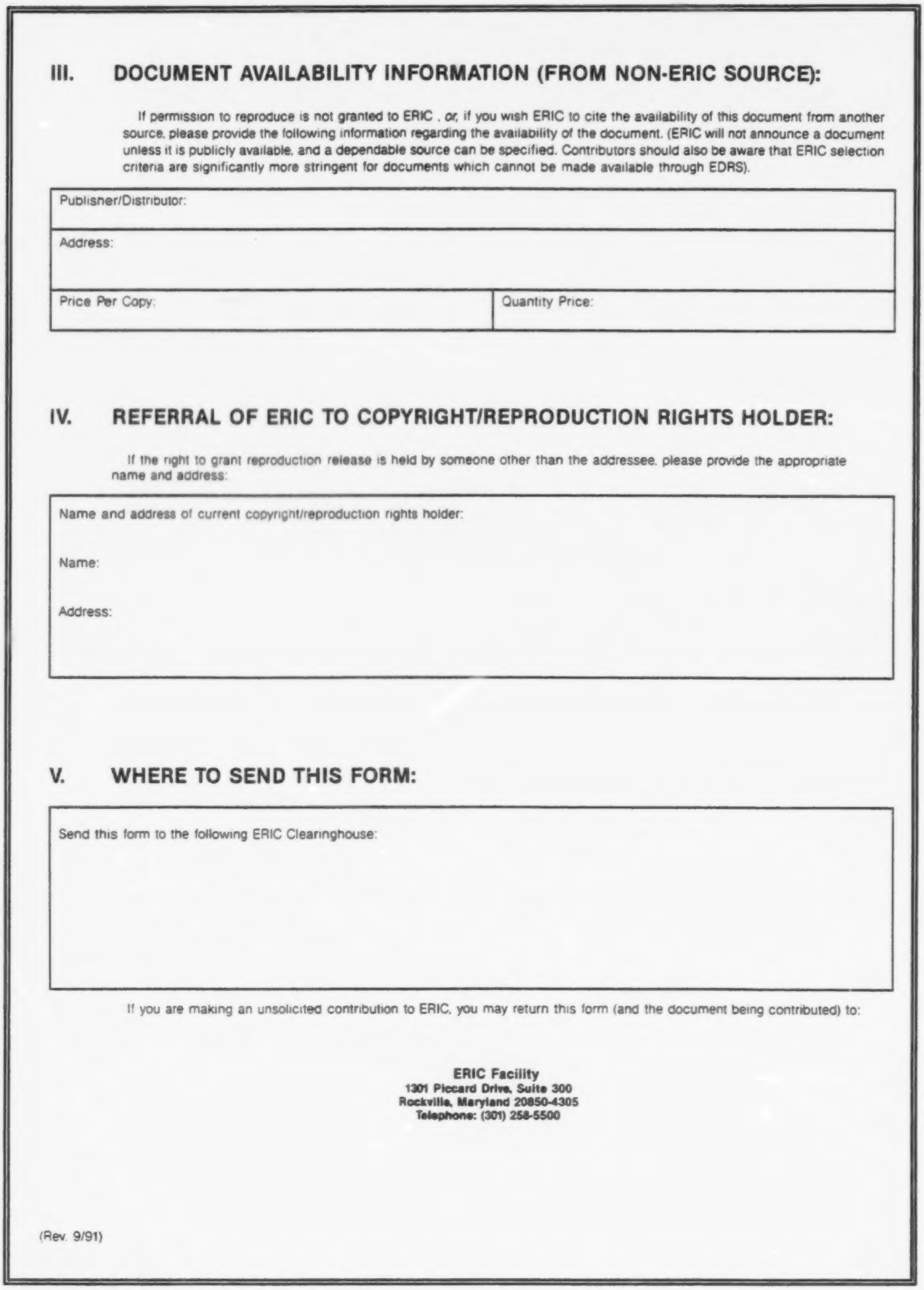
Documents will be processed as indicated provided reproduction quality permits. If permission to reproduce is granted, but neither box is checked, documents will be processed at Level 1.

"I hereby grant to the Educational Resources Information Center (ERIC) nonexclusive permission to reproduce this document as indicated above. Reproduction from the ERIC microfiche or electronic/optical media by persons other than ERIC employees and its system contractors requires permission from the copyright holder. Exception is made for non-profit reproduction by libraries and other service agencies to satisfy information needs of educators in response to discrete inquiries."

Signature:	Position:
Printed Name:	Organization:
Address:	Telephone Number: ( )
	Date:

OVER

FIGURE II-5: Reproduction Release Forms - A. Specific Document Release



III. DOCUMENT AVAILABILITY INFORMATION (FROM NON-ERIC SOURCE):

If permission to reproduce is not granted to ERIC , or, if you wish ERIC to cite the availability of this document from another source, please provide the following information regarding the availability of the document. (ERIC will not announce a document unless it is publicly available, and a dependable source can be specified. Contributors should also be aware that ERIC selection criteria are significantly more stringent for documents which cannot be made available through EDRS).

Publisher/Distributor:

Address:

Price Per Copy:

Quantity Price:

IV. REFERRAL OF ERIC TO COPYRIGHT/REPRODUCTION RIGHTS HOLDER:

If the right to grant reproduction release is held by someone other than the addressee, please provide the appropriate name and address:

Name and address of current copyright/reproduction rights holder:

Name:

Address:

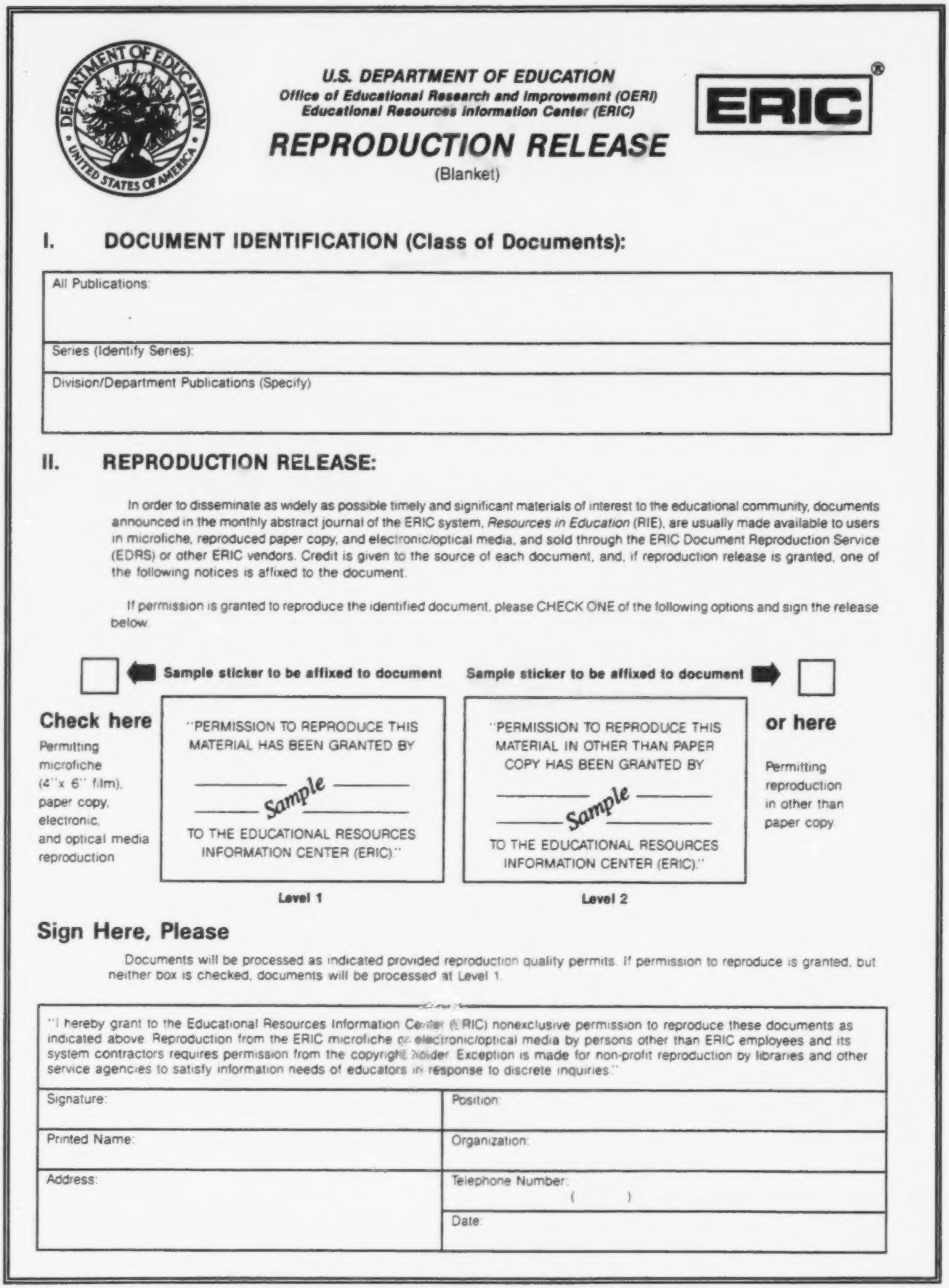
V. WHERE TO SEND THIS FORM:

Send this form to the following ERIC Clearinghouse:

If you are making an unsolicited contribution to ERIC, you may return this form (and the document being contributed) to:

ERIC Facility
1301 Piccard Drive, Suite 300
Rockville, Maryland 20850-4305
Telephone: (301) 258-5500

(Rev. 9/91)



U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement (OERI)
Educational Resources Information Center (ERIC)

ERIC®

REPRODUCTION RELEASE
(Blanket)

I. DOCUMENT IDENTIFICATION (Class of Documents):

All Publications:
Series (Identify Series):
Division/Department Publications (Specify)

II. REPRODUCTION RELEASE:

In order to disseminate as widely as possible timely and significant materials of interest to the educational community, documents announced in the monthly abstract journal of the ERIC system, *Resources in Education* (RIE), are usually made available to users in microfiche, reproduced paper copy, and electronic/optical media, and sold through the ERIC Document Reproduction Service (EDRS) or other ERIC vendors. Credit is given to the source of each document, and, if reproduction release is granted, one of the following notices is affixed to the document.

If permission is granted to reproduce the identified document, please CHECK ONE of the following options and sign the release below.

☐ ⬅ **Sample sticker to be affixed to document**

Check here

Permitting microfiche (4"x 6" film), paper copy, electronic, and optical media reproduction

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Sample

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Level 1

Sample sticker to be affixed to document ➡ ☐

"PERMISSION TO REPRODUCE THIS MATERIAL IN OTHER THAN PAPER COPY HAS BEEN GRANTED BY

Sample

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Level 2

or here

Permitting reproduction in other than paper copy.

Sign Here, Please

Documents will be processed as indicated provided reproduction quality permits. If permission to reproduce is granted, but neither box is checked, documents will be processed at Level 1.

"I hereby grant to the Educational Resources Information Center (ERIC) nonexclusive permission to reproduce these documents as indicated above. Reproduction from the ERIC microfiche or electronic/optical media by persons other than ERIC employees and its system contractors requires permission from the copyright holder. Exception is made for non-profit reproduction by libraries and other service agencies to satisfy information needs of educators in response to discrete inquiries."

Signature:	Position:
Printed Name:	Organization:
Address:	Telephone Number: ( )
	Date:

FIGURE II-5: Reproduction Release Forms
B. Blanket Release (Page 1)

III. DOCUMENT AVAILABILITY INFORMATION (FROM NON-ERIC SOURCE):

If permission to reproduce is not granted to ERIC , or, if you wish ERIC to cite the availability of these documents from another source, please provide the following information regarding the availability of the document. (ERIC will not announce a document unless it is publicly available, and a dependable source can be specified. Contributors should also be aware that ERIC selection criteria are significantly more stringent for documents which cannot be made available through EDRS).

Publisher/Distributor:	
Address:	
Price Per Copy:	Quantity Price:

IV. REFERRAL OF ERIC TO COPYRIGHT/REPRODUCTION RIGHTS HOLDER:

If the right to grant reproduction release is held by someone other than the addressee, please provide the appropriate name and address:

Name and address of current copyright/reproduction rights holder:

Name:

Address:

V. WHERE TO SEND THIS FORM:

Send this form to the following ERIC Clearinghouse:

If you are making an unsolicited contribution to ERIC, you may return this form (and the document(s) being contributed) to:

ERIC Facility
1301 Piccard Drive, Suite 300
Rockville, Maryland 20850-4305
Telephone: (301) 258-5500

(Rev. 11/91)

Many questions arise concerning copyright and reproduction release matters. The following points speak to the most common problems. For problems not covered here, contact the ERIC Facility or Central ERIC.

a. Public Domain

A document prepared by or sponsored by the Federal Government is normally considered to be in the public domain. On occasion, however, the Government will permit a contractor to copyright a document, usually in order to facilitate dissemination. When this is done the copyright is clearly marked. Such a document is technically not in the public domain, but the Government nevertheless reserves the right to reproduce such documents "for Government purposes." ERIC is considered to be such a Government "purpose."

A document prepared by a private person or organization is normally considered to be potentially copyrighted and ***not*** in the public domain, even if it doesn't carry a copyright notice. There are two exceptions:

- Works published before January 1, 1978 (the date of the first Copyright Revision Law, PL-94-553) that do not carry a copyright notice are not protected and can be considered in the public domain.
- Works published between January 1, 1978 and February 28, 1989 (the date the U.S. signed the Berne copyright convention) that do not carry a copyright notice, must be formally registered within five years of the date of publication or they are considered to be in the public domain. Since it is difficult to know whether such registration has occurred, the practical effect of this clause is nil, i.e., all documents written after January 1, 1978 must be considered copyrighted or potentially copyrighted and therefore ***not*** in the public domain.

b. Announcement without Reproduction

It is legally permissible to abstract (at the length provided for by ERIC guidelines) and to announce copyrighted documents at Level 3, whether or not a Reproduction Release has been obtained. Announcement alone does not violate copyright. However, ERIC does not announce any document unless users can be referred to a source of availability.

c. Multiple Authors

If a document having multiple authors requires a Reproduction Release Form, a signed release from any one of the authors is considered sufficient. However, if the material is severable by author, it would be prudent to obtain a release from each author (unless a general release already obtained makes it clear that further releases are unnecessary).

d. GPO and NTIS Documents

Documents printed by GPO or NTIS, that do not carry a copyright notice, do not require a reproduction release. They are assumed to have been generated with Federal government funding under terms that either place them in the public domain or else reserve a free right of reproduction for U.S. Government purposes.

e. Speeches

Speeches written and/or delivered in the author's private capacity require a reproduction release. Speeches written by an employee of the Federal Government, operating in an official capacity, do not require a release.

f. State Documents

State-funded documents, whether bearing a copyright notice or not, require a Reproduction Release Form (unless they are federally-supported).

g. International/Foreign Copyright

Copyright under the Universal Copyright Convention is indicated by the © symbol. However, since there are numerous other bilateral and multilateral agreements between and among countries affecting the copyright picture, it is advisable to handle foreign documents the same as domestic documents as far as permissions and releases are concerned. In other words, the presence or absence of the © symbol should not affect the decision to seek a release.

h. Journal Article Publication

Documents generated with Federal Government funding are in the public domain. Such documents may later also be published as journal articles, but will often carry a notice (e.g., a footnote) reserving the Government's right to reproduce and/or excluding them from the overall journal issue copyright. Journal articles normally are processed for *Current Index to Journals in Education* (CIJE).

i. Federally-Funded Documents (Including Contractor Reports)

Federally-funded documents may result from grants or contracts funded by Federal agencies. If a Federally-funded work is copyrighted, the Federal Government nonetheless retains an irrevocable, nonexclusive, worldwide, paid-up right or license to publish, duplicate, use, and to allow others to so use the work, for Federal Government purposes. Reproduction and dissemination through the ERIC system are considered to be "Federal Government purposes" within the meaning of the Federal right or license retained in copyrighted works that are produced with Federal funds.

In summary, the Government reserves the right to reproduce for its own purposes all Federally-funded documents. Reproduction by ERIC is considered "for Government purposes." This includes, for example, any Federally-funded but also copyrighted documents of states, local governments, and school districts. It also includes the instances where a Government agency has granted a contractor the right to copyright a given document for a limited period of time (perhaps to facilitate dissemination objectives).

It is therefore possible to construct the following decision matrix:

	No Copyright Notice	Copyright Notice
Federally-Funded	No Release Necessary	Technically No Release Necessary, but prudent to check with source or agency
--Department of Education-Funded	No Release Necessary	No Release Necessary
Not Federally-Funded	Release Necessary	Release Necessary

As can be seen, Federal non-Department of Education documents bearing a copyright notice should be checked to determine whether a release is necessary. If in doubt, or if some questionable variation of this situation occurs, contact the ERIC Facility or Central ERIC.

j. Letter in Lieu of Release

At the present time, a letter giving ERIC permission to reproduce an accompanying document is not sufficient no matter how explicit the letter may be. ERIC policy is that a *Reproduction Release (Blanket)* or a *Reproduction Release (Specific Document)* form must be obtained to cover every document that is not Federally-prepared or Federally-supported.

k. Copyrighted Segments of a Document

Some documents contain segments copyrighted by someone other than the producer of the entire document. The document may be left intact if:

- ERIC has permission from the segment's copyright holder; or
- the segment is small in relation to the overall work from which it is taken, so that its reproduction might be allowable under the copyright law's "Fair Use" clause; or
- the original permission obtained from the segment author by the producer of the document in hand (containing the segment) is broadly stated and can be assumed to extend to all printings, reprintings, and other forms of the document in hand, including its duplication in ERIC.

In general, documents should be left intact whenever possible, for the benefit of the user. Problem cases should be referred to the ERIC Facility for resolution.

9. Non-U.S. Documents and Non-English Documents

a. Non-U.S. Documents

Documents not available from sources in the United States may be acquired and selected for ERIC, but must meet more stringent criteria for quality and availability/reproducibility. In addition, it is highly recommended that documents written in uncommon foreign languages, should, if at all possible, be accompanied by a 1,000-1,500 word summary in English for the benefit of English-speaking users not proficient in the language of the text.

b. Non-English Documents

- **Domestic (Including Canada)**

  Non-English documents are acceptable for the database and the Language field helps identify such documents. Many U.S.-produced, as well as Canadian, non-English documents also have an English edition. The "twin" documents should either be combined into one accession or cross-referenced in the Note field (e.g., "For English edition, see..."). Non-English curriculum guides produced domestically may be processed without English summaries on the assumption that the audience needing these documents will be able to read the language in which they are written.

- **Non-U.S./Canada**

  Because English functions essentially as an international language, documents such as conference proceedings with non-English papers frequently are accompanied by an English abstract. Non-English documents written in the major european languages: Spanish, French, German, etc., without English abstracts, do not need a summary written in English, as many ERIC users read one or more of these common languages. The Arabic, Japanese, Chinese, and Cyrillic-based languages are lesser known, and if possible, documents in these languages should be accompanied by a 1000-1500 word summary. Non-English documents are typically assigned on the basis of subject scope and are not automatically assigned to the Clearinghouse on Languages and Linguistics.

The acquisitions/selection criteria, and other policies and guidelines pertaining to foreign documents, have been formalized by a special ERIC committee and are provided here verbatim (see **Figure II-6**).

10. Recordkeeping

Acquisitions statistics are used primarily to facilitate the acquisitions effort and to permit Clearinghouses to identify organizations, conferences, authors, and other sources, that are prime sources of documents. While recordkeeping practices vary from Clearinghouse to Clearinghouse, all should be evaluated and justified in terms of their utility and effectiveness in helping to bring documents into the system.

The following are typical categories of acquisition information or statistics captured by Clearinghouses: (1) types of contributors; (2) types of documents received; (3) subject areas of documents received; (4) documents requested via the Facility; (5) documents arriving with reproduction releases; (6) productivity of second request follow-up efforts; (7) solicitations returned due to incorrect addresses; (8) reason for rejection of documents (e.g., not education-related, no reproduction release, too old, too short or insubstantial, incomplete, illegible, local interest only, poor quality, submitted to covered journal, promotional or advertising in nature,

NON-U.S. DOCUMENTS

Policies and Guidelines for Acquiring and Selecting Non-U.S. Documents for the ERIC System

1. PURPOSE

To assist Clearinghouses in acquiring and selecting non-U.S. documents; and to assist foreign nationals, international organizations, intergovernmental agencies, foreign ministries of education, and other foreign government agencies in submitting documents to ERIC.

Rationale: Acquisition of non-U.S. documents is a cooperative venture between the Facility and the Clearinghouses. The Facility maintains agreements with foreign ministries of education and international organizations on behalf of the ERIC system. Selection is a Clearinghouse function. These policies and guidelines, together with those in the *ERIC Processing Manual* (EPM), should help to establish some consistency of non-U.S. document input.

2. DEFINITION OF NON-U.S. DOCUMENTS

Non-U.S. documents are publications which are produced in a country other than the United States or by an international agency. Non-U.S. documents may or may not be in a foreign language.

Rationale: This definition is an attempt to differentiate between a non-U.S. document and a foreign language document. Some foreign language documents are produced in the U.S. There are many non-U.S. documents in English. The GOV and LANG data elements will help to promote acceptance of this distinction.

3. LANGUAGE OF THE TEXT

When a document is not in English (whether it is non-U.S. or domestic), it should ideally be accompanied by a 1,000-1,500 word summary in English.

Rationale: ERIC is an English language information system. In order to better serve the user population, a more complete summary of documents in foreign languages should be provided than that available in a 200-word abstract. Therefore, a 1,000-1,500 word English summary, prepared by the individual or organization submitting the document, should accompany each foreign language document as an integral part of that document. A 1,000 word summary is often adequate to characterize the essential content of shorter documents received from non-U.S. sources. Exceptions to the requirement of an English-language summary may be made when the potential users of the document are expected to be familiar with the language of the document; this would apply particularly to users of documents submitted by the ERIC Clearinghouse on Languages and Linguistics.

4. QUALITY OF CONTENT

Non-U.S. documents should meet higher quality criteria than those applied to domestic documents. Each Clearinghouse is encouraged to review its unique acquisition policies in regard to non-U.S. documents and to develop its own priorities and special guidelines.

Rationale: For there to be as little criticism as possible in regard to the inclusion of non-U.S. documents, the significance and quality of non-U.S. documents should be well above the level considered to be necessary for domestic documents.

5. TECHNICAL REQUIREMENTS (PERTAINING TO REPRODUCIBILITY)

All non-U.S. documents should meet the technical standards required of all domestic documents. Such standards are concerned with reproducibility, legibility, physical quality, and page size. The *ERIC Document Reproducibility Guidelines* should be followed.

Rationale: There is no reason to vary technical physical standards from those currently in force.

6. TYPES OF DOCUMENTS

Document types to be considered from non-U.S. sources will be the same types as those considered from domestic sources, except for the following types which are not encouraged for submission: resource guides, legislation and regulations, brochures and pamphlets. There will be exceptions, but as a general rule, those items which are easily dated, of highly specific local use, and which list resources generally available only in a foreign country, should receive lower priorities.

Rationale: Each Clearinghouse will ultimately make its own selection decision, but as a general guideline there are certain documents such as those mentioned above, which appear to be of lower priority than others.

7. LEVEL 3 DOCUMENTS

In general, Level 3 is not an option for non-U.S. documents. Levels 1 and 2 should be thoroughly explained to non-U.S. contributors. The Level 3 option should never be used unless a reliable source of copies can be identified.

Rationale: Non-U.S. Level 3 documents should be discouraged even more than domestic Level 3s. However, there are rare times when non-U.S. Level 3 documents should be included. This policy permits limited inclusion, but strongly discourages solicitation of such documents.

FIGURE II-6: Non-U.S. Documents--Policies and Guidelines for Acquiring and Selecting Non-U.S. Documents For the ERIC System

newsletter, etc.); (9) number of returns for each conference solicited; (10) reproducible documents received (versus non-reproducible receipts); (11) organizations tending to submit acceptable documents (versus those submitting rejected documents); (12) organizations submitting documents automatically or periodically on the basis of agreement (periodic reminders or follow-ups to such organizations are necessary).

11. Reporting to Central ERIC

The following statistics for Clearinghouse acquisitions efforts are to be reported to Central ERIC on a quarterly basis and at the annual review: (1) total documents acquired; (2) total solicitations; (3) number of acquired documents solicited; (4) number of acquired documents unsolicited; (5) number of documents selected for RIE; (6) number of documents rejected; (7) number of documents transferred (to other Clearinghouses).

For specifics of Central ERIC's current reporting requirements, **see Section 7.3** of the *ERIC Administrative Procedures Manual.*

12. Reporting to the ERIC Facility

The ERIC Clearinghouses are not required to report acquisitions statistics to the ERIC Facility, but they are required to report all new "Acquisitions Arrangements," for inclusion in the annual compilation *ERIC Acquisitions Arrangements.*

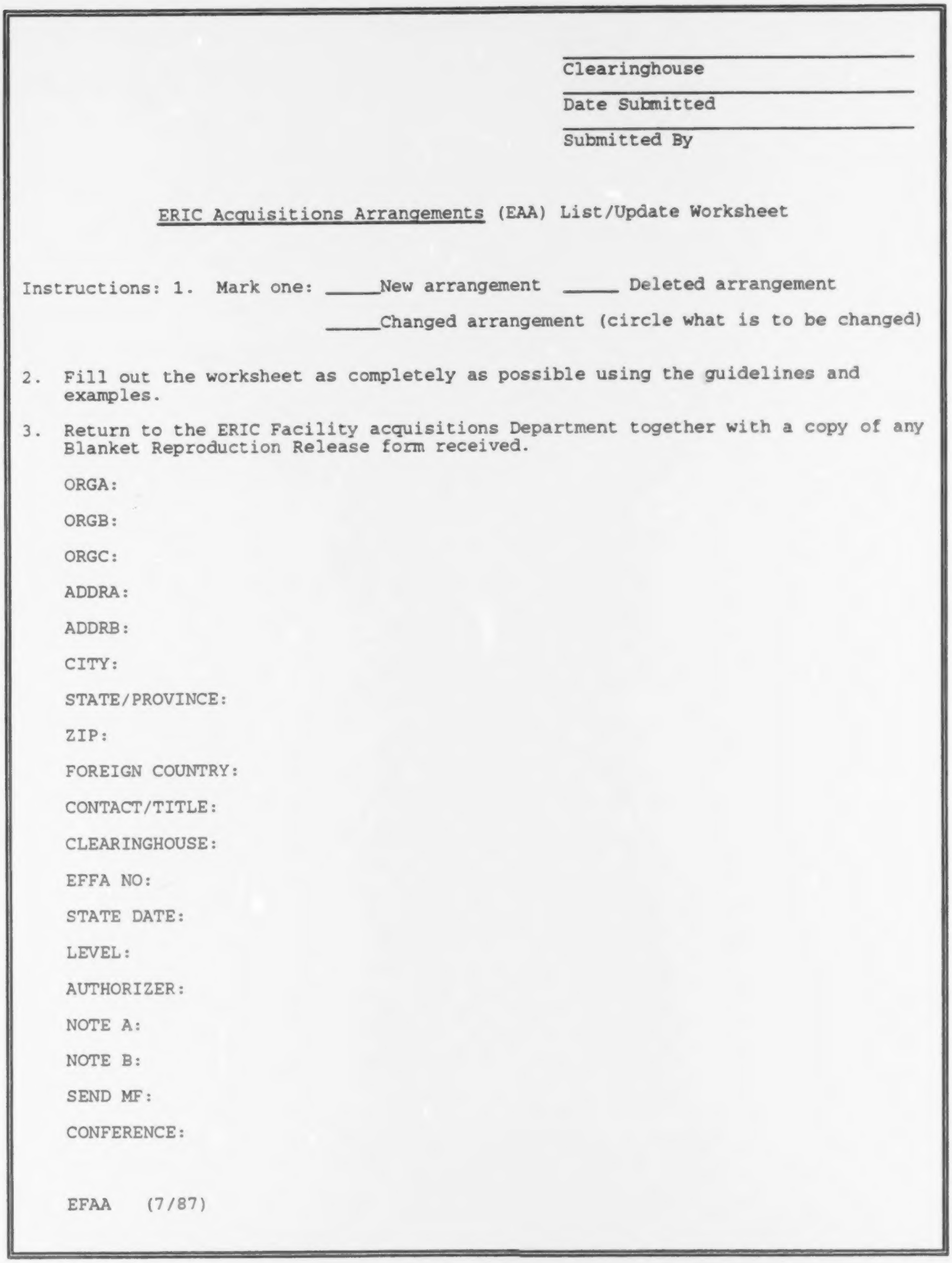
New acquisitions arrangements are to be reported using a specific form that provides for all of the categories of information needed, e.g., contact person, level of reproduction permission, where complimentary microfiche should be sent, etc. (See **Figure II-7(A)**).

F. ERIC Facility Acquisitions Program

1. Scope and Purpose

The ERIC Facility Acquisitions Program was initiated for the following reasons:

- to increase the flow of documents to the Clearinghouses from certain sectors (Federal, State, and International);
- to build a foundation of automatic acquisition/distribution arrangements;
- to serve as an expediter for the complex area of Federal Government documents (where being located in the Washington area is important);
- to coordinate network acquisition efforts and limit redundancy and confusion (e.g., by maintaining the *ERIC Acquisitions Arrangements* list);
- to eliminate multiple solicitations by various network components to any one Government agency, state department of education, or other organization dealing broadly with the field of education.



Clearinghouse

Date Submitted

Submitted By

ERIC Acquisitions Arrangements (EAA) List/Update Worksheet

Instructions: 1. Mark one: _____New arrangement _____ Deleted arrangement

_____Changed arrangement (circle what is to be changed)

2. Fill out the worksheet as completely as possible using the guidelines and examples.
3. Return to the ERIC Facility acquisitions Department together with a copy of any Blanket Reproduction Release form received.

ORGA:

ORGB:

ORGC:

ADDRA:

ADDRB:

CITY:

STATE/PROVINCE:

ZIP:

FOREIGN COUNTRY:

CONTACT/TITLE:

CLEARINGHOUSE:

EFFA NO:

STATE DATE:

LEVEL:

AUTHORIZER:

NOTE A:

NOTE B:

SEND MF:

CONFERENCE:

EFAA (7/87)

FIGURE II-7: ERIC Acquisitions Arrangements (EAA) List
A. Reporting New Arrangement to Facility

Facility efforts are concentrated in the following areas: Federal agencies; state departments of education; foreign ministries of education; international and intergovernmental organizations; professional associations or other entities covering education broadly (e.g., NEA).

The Facility makes arrangements with the OERI-sponsored Educational Laboratories** to receive directly all of their reports that are approved for public dissemination. In addition, the Facility receives all Department of Education input from Central ERIC and all unsolicited input arriving at Central ERIC or EDRS. All such documents are assigned to appropriate Clearinghouses for processing. The Facility maintains the *ERIC Clearinghouse Scope of Interest Guide* (see **Appendix A**) on the basis of information received from the Clearinghouses.

The Facility functions in direct support of the Clearinghouses by obtaining the documents of organizations whose programs cover the entire spectrum of education. The Facility also functions in many respects as an agent of Central ERIC. It receives direct requests for action from Central ERIC involving both automatic arrangements and specific documents. It works with Central ERIC to see that all Department of Education internal reports are obtained for the system. Visits to Government agencies to establish arrangements often are made by Central ERIC and Facility staff working together. Special acquisition projects often are assigned to the Facility by Central ERIC.

Facility acquisitions are intended to augment and supplement the main ERIC acquisitions effort, which resides at the Clearinghouses.

2. Sources of Documents

a. Central ERIC

All Department of Education and unsolicited documents acquired by Central ERIC are delivered to the Facility by courier for recording and assignment to Clearinghouses. The Facility is frequently asked by Central ERIC to report on the receipt or status of particular documents and to expedite PRIORITY documents. The Facility requests certain Department of Education documents from Central ERIC by title. The Facility refers all policy questions concerning copyright or reproduction release to Central ERIC. Central ERIC refers organizations and individuals to the Facility for follow-up acquisitions contacts. In some cases, arrangements are initiated by Central ERIC and completed by the Facility.

b. Automatic Distribution Arrangements

(1) ERIC Facility Acquisitions Arrangements (EFAAs)

In its area of responsibility, the Facility routinely contacts education-related organizations in order to establish agreements with them to acquire relevant publications on a regular basis and to secure Blanket Reproduction Releases, where appropriate. When an organization is willing to cooperate, details are worked out and the following steps are taken: (1) a signed release form (if necessary) is obtained; (2) Reply Cards are offered; and (3) informational ERIC materials are sent to the new contributor.

**The OERI-sponsored Research and Development Centers are each assigned to a specific Clearinghouse.

When documents begin arriving: (1) the organization is given a number and listed as an EFAA; and, (2) a copy of all documentation is submitted to Central ERIC. All EFAAs are listed alphabetically in the periodic *ERIC Acquisitions Arrangements* (EAA) list (see **Figure II-7(B)**). EFAAs are monitored continuously to determine whether publications are still being received. Notification of new EFAA arrangements or changes in established arrangements are announced annually in a supplement to the *ERIC Administrative Bulletin* (EAB).

(2) Exchange Arrangements

In order to establish acquisitions arrangements with large international organizations and foreign ministries of education, the Facility is authorized, subject to Central ERIC approval, to offer a complimentary subscription to RIE in exchange for the organization's publications. This type of arrangement is monitored to ensure that ERIC receives a commensurate number of appropriate documents.

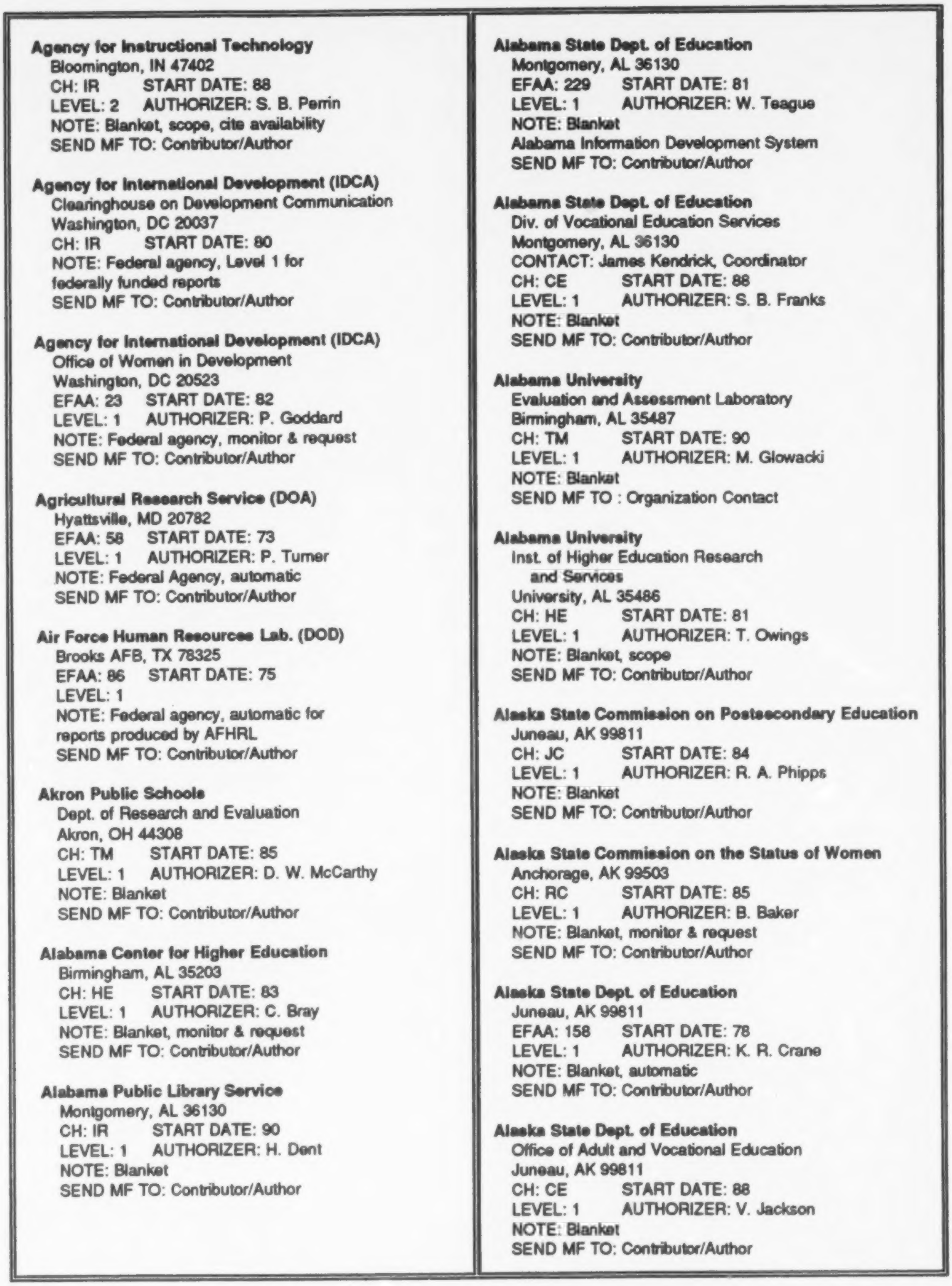
(3) Standing Orders

Where possible and appropriate, the Facility enters into standing order arrangements to obtain desired publications not available in other ways.

c. Specific Requests

Many organizations neither maintain distribution lists nor produce enough documents of interest to ERIC to warrant establishing an acquisitions arrangement. Documents from organizations of this type must be acquired on a title-by-title basis. For this purpose, the Facility employs form letters, free copies of ERIC publications, and generally includes a Reproduction Release Form.

Requests for specific titles are generated either by requests from the Clearinghouses or by scanning the serial publications, newsletters, and brochures of organizations within the Facility's scope.



Agency for Instructional Technology
Bloomington, IN 47402
CH: IR START DATE: 88
LEVEL: 2 AUTHORIZER: S. B. Perrin
NOTE: Blanket, scope, cite availability
SEND MF TO: Contributor/Author

Agency for International Development (IDCA)
Clearinghouse on Development Communication
Washington, DC 20037
CH: IR START DATE: 80
NOTE: Federal agency, Level 1 for federally funded reports
SEND MF TO: Contributor/Author

Agency for International Development (IDCA)
Office of Women in Development
Washington, DC 20523
EFAA: 23 START DATE: 82
LEVEL: 1 AUTHORIZER: P. Goddard
NOTE: Federal agency, monitor & request
SEND MF TO: Contributor/Author

Agricultural Research Service (DOA)
Hyattsville, MD 20782
EFAA: 58 START DATE: 73
LEVEL: 1 AUTHORIZER: P. Turner
NOTE: Federal Agency, automatic
SEND MF TO: Contributor/Author

Air Force Human Resources Lab. (DOD)
Brooks AFB, TX 78325
EFAA: 86 START DATE: 75
LEVEL: 1
NOTE: Federal agency, automatic for reports produced by AFHRL
SEND MF TO: Contributor/Author

Akron Public Schools
Dept. of Research and Evaluation
Akron, OH 44308
CH: TM START DATE: 85
LEVEL: 1 AUTHORIZER: D. W. McCarthy
NOTE: Blanket
SEND MF TO: Contributor/Author

Alabama Center for Higher Education
Birmingham, AL 35203
CH: HE START DATE: 83
LEVEL: 1 AUTHORIZER: C. Bray
NOTE: Blanket, monitor & request
SEND MF TO: Contributor/Author

Alabama Public Library Service
Montgomery, AL 36130
CH: IR START DATE: 90
LEVEL: 1 AUTHORIZER: H. Dent
NOTE: Blanket
SEND MF TO: Contributor/Author

Alabama State Dept. of Education
Montgomery, AL 36130
EFAA: 229 START DATE: 81
LEVEL: 1 AUTHORIZER: W. Teague
NOTE: Blanket
Alabama Information Development System
SEND MF TO: Contributor/Author

Alabama State Dept. of Education
Div. of Vocational Education Services
Montgomery, AL 36130
CONTACT: James Kendrick, Coordinator
CH: CE START DATE: 88
LEVEL: 1 AUTHORIZER: S. B. Franks
NOTE: Blanket
SEND MF TO: Contributor/Author

Alabama University
Evaluation and Assessment Laboratory
Birmingham, AL 35487
CH: TM START DATE: 90
LEVEL: 1 AUTHORIZER: M. Glowacki
NOTE: Blanket
SEND MF TO : Organization Contact

Alabama University
Inst. of Higher Education Research and Services
University, AL 35486
CH: HE START DATE: 81
LEVEL: 1 AUTHORIZER: T. Owings
NOTE: Blanket, scope
SEND MF TO: Contributor/Author

Alaska State Commission on Postsecondary Education
Juneau, AK 99811
CH: JC START DATE: 84
LEVEL: 1 AUTHORIZER: R. A. Phipps
NOTE: Blanket
SEND MF TO: Contributor/Author

Alaska State Commission on the Status of Women
Anchorage, AK 99503
CH: RC START DATE: 85
LEVEL: 1 AUTHORIZER: B. Baker
NOTE: Blanket, monitor & request
SEND MF TO: Contributor/Author

Alaska State Dept. of Education
Juneau, AK 99811
EFAA: 158 START DATE: 78
LEVEL: 1 AUTHORIZER: K. R. Crane
NOTE: Blanket, automatic
SEND MF TO: Contributor/Author

Alaska State Dept. of Education
Office of Adult and Vocational Education
Juneau, AK 99811
CH: CE START DATE: 88
LEVEL: 1 AUTHORIZER: V. Jackson
NOTE: Blanket
SEND MF TO: Contributor/Author

FIGURE II-7(B): ERIC Acquisitions Arrangements (EAA)
B. Sample Page (of Annual List)

(1) **Clearinghouse Requests**

Clearinghouses are requested to ask the Facility for documents they wish to obtain from any organization with which the Facility has an existing arrangement, or from any branch of the Federal Government. The Facility will either obtain the documents or let the Clearinghouse know if they are unavailable. Occasionally, Central ERIC also requests the Facility to obtain specific titles.

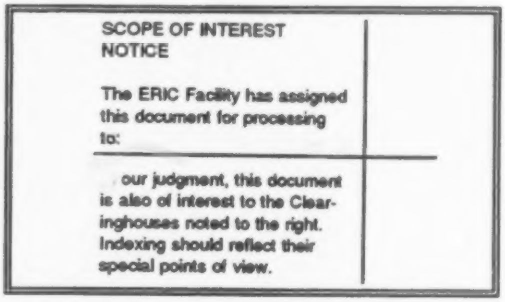
(2) **Scanning**

Serial publications, newsletters, and brochures of the organizations within the Facility's scope are regularly scanned. *GPO's Monthly Catalog of U.S. Government Publications* is reviewed cover-to-cover every month for education-related documents. NTIS's *Government Reports Announcements* (GRA) is also regularly scanned (particularly Section 5) for this purpose. In each case, the Facility first attempts to obtain relevant documents from the original source before considering purchase.

Publication lists, news releases, etc., outside the Facility's scope of interest are forwarded to the appropriate Clearinghouses.

3. Assignment of Documents to Clearinghouses

All documents received by the Facility are assigned to the single most appropriate Clearinghouse for evaluation and selection. The proper assignment is determined by reference to the Facility-maintained *ERIC Clearinghouse Scope of Interest Guide* (**see EPM, Appendix A**). When a document overlaps the scope of two or more Clearinghouses, the Facility assigns the document to the Clearinghouse with, in its judgment, the strongest claim to jurisdiction over the subject matter of the document. However, a copy of the title page is transmitted to the other interested Clearinghouses, together with a sticker (**Figure II-8**) indicating where the basic assignment was made. The sticker serves to alert those Clearinghouses that might like to question the assignment; it also tells the Clearinghouse receiving the document that care should be taken in indexing to reflect the interests of the related Clearinghouses.



SCOPE OF INTEREST NOTICE

The ERIC Facility has assigned this document for processing to:

our judgment, this document is also of interest to the Clearinghouses noted to the right. Indexing should reflect their special points of view.

FIGURE II-8. Scope Overlap Sticker

No selection decisions are made at the Facility. All documents received are assigned. Even flyers, brochures, news releases, and handouts are forwarded to the Clearinghouses for their information value (though such materials are not part of the statistical count of documents assigned).

4. *ERIC Acquisitions Arrangements* (EAA) Systemwide List

The Facility publishes annually a cumulative systemwide list of all Clearinghouse and Facility acquisitions arrangements (see **Figure II-7B** for a sample page). Entries cite the name of the organization, location, date arrangement began, level of reproduction release, authorization, authorizing person, and any additional explanatory notes. The list includes all organizations whose materials are regularly and routinely acquired by ERIC and its use helps to prevent duplicate acquisitions efforts and to facilitate the exchange of release forms.

In soliciting new ERIC Partners or new ERIC Acquisitions Arrangements, Clearinghouses should always first check the *ERIC Acquisitions Arrangements* (EAA) list and its supplements. Organizations already listed in the EAA as arrangements of the ERIC Facility or of another ERIC Clearinghouses should not be contacted without the prior approval of the components claiming them.

Changes, additions, and dilemmas to the EAA should be reported to the ERIC Facility using the special form designed for this purpose (see **Figure II-7(A)** "ERIC Acquisitions Arrangements (EAA) List Update Worksheet." Acquisitions Coordinators at the Clearinghouses should send a completed copy of this form, together with any accompanying blanket release form, to the ERIC Facility whenever changes occur in arrangements.

5. Standard Forms Used By the Facility

A number of forms, cards, and stickers or labels are used by the Facility to help expedite work flow, as follows:

a. Form Letters

The Facility uses several form letters to serve a variety of recurring needs: e.g., "Request for Specific Document(s);" "General Solicitation;" "Thank You Letter" (see **Figures II-10(A-C)**).

b. Reply Cards

The Facility has a Standard Reply card form that is often used when disposition information is requested by the contributor. These forms are provided upon request to contributors to affix to incoming documents. (See **Figure II-3**.)

c. Reproduction Release Forms (Blanket and Individual)

The Facility is responsible for the two Reproduction Release Forms used by the system. Modifications are made at Central ERIC's direction and supplies of both forms are stocked by the Facility. (**See Figures II-5 (A-B)** previously listed.)

6. Recordkeeping

The acquisitions effort requires the creation of several specific files. Only those most relevant to external ERIC components will be described here.

a. In-Process File

An automated title file is maintained of all documents coming into the Facility, whether solicited or unsolicited. This file records the title, date received, Clearinghouse assignment, and any other important information, providing a duplicate check and location control over all Facility receipts.

b. Acquisitions Arrangements File

Individual file folders are kept on each formal acquisitions arrangement, including all correspondence and all Blanket Reproduction Release information.

7. Reporting to Central ERIC

The following regular reports are provided to Central ERIC:

- Acquisitions Department activities and statistics are reported in the monthly *Facility Report* to Central ERIC.
- Acquisitions statistics are summarized by source in the quarterly *Acquisitions Summary Report.*
- Special *ad hoc* acquisition reports may be requested periodically throughout the year by Central ERIC, e.g., foreign receipts, practitioner-oriented materials, etc.

8. Miscellaneous

a. National Diffusion Network (NDN)

The Facility cooperates with NDN in an effort to see that all NDN documents are considered for input to ERIC.

b. Alerting Services

Occasionally, the Facility engages in activities calculated to alert the Clearinghouses to new publications of interest, e.g., Baker & Taylor Current Awareness Service, etc. In all such cases, the responsibility for deciding upon further acquisitions action rests with the Clearinghouse.

c. Program Effectiveness Panel (PEP)

The Program Effectiveness Panel (PEP) is a continuation of the previous Joint Dissemination Review Panel (JDRP)--both are efforts to identify successful projects whose results can be validated.

ERIC cooperates with PEP in an effort to receive packages of project reports, project-descriptive materials, and sample outputs, that can be entered into the ERIC database and archived on microfiche as resource materials for research on successful projects.

G. *Current Index to Journals in Education* (CIJE)

CIJE covers journal articles, not documents. Therefore, acquisitions efforts for CIJE are concerned with arranging subscriptions for appropriate journals.

The CIJE Publisher maintains a complete list of all journals currently covered on a regular basis, comprehensively or selectively. This list is published as the "Source Journal Index" in each monthly issue of CIJE. The "Source Journal Index" cites for each journal, the publisher, publisher address, frequency, price, ISSN number, assigned Clearinghouse, and whether the journal is covered comprehensively.

Each journal covered is assigned, on the basis of its subject matter, to a particular ERIC Clearinghouse. In most cases, Clearinghouses "assign" journals to themselves by volunteering to cover a particular journal.

Journals that cover more than one area of the field of education, that fall outside the scope of any existing Clearinghouse, or that cover the field of education broadly, are "assigned" by an informal process of negotiation often involving Central ERIC, the ERIC Facility, and the most relevant Clearinghouses.

A Clearinghouse that accepts responsibility for a particular journal must subscribe to the journal (or obtain a complimentary subscription) and must ensure that all issues are obtained and screened. (See **Figure II-11-G** for a typical Clearinghouse request for a complimentary journal subscription). *A Clearinghouse responsible for a given journal is responsible for all education-related articles in that journal and not just for those within its scope.*

The selection of new journals is the responsibility primarily of the Clearinghouses; however, a new journal may be nominated for coverage by any ERIC component. Information concerning a candidate journal should be sent, together with any supporting information, to the relevant Clearinghouse. If the relevant Clearinghouse cannot be determined, the candidate should be sent to the ERIC Facility which, in conjunction with Central ERIC, will make this determination.

This responsibility for deciding whether to cover a new journal rests with the Clearinghouses. When the total number of journals covered by CIJE is considered by the CIJE Publisher to be at or close to the maximum, it may be necessary to delete a more marginal journal in order to add a more significant journal.

Journals covered by CIJE can be classified into three groups:

1. Comprehensively Covered Journals

Journals of high quality that are concerned entirely with the field of education are processed "cover-to-cover," i.e., all significant articles are cataloged and indexed. This excludes editorials, letters to the editor, schedules of events, newsletters, book reviews, regular columns, and advertising. It is useful to the practicing educator, reference librarian, educational researcher, or other user to be assured that all articles in such journals will be indexed by CIJE. Such journals are indicated by an asterisk in the *"Source Journal Index."*

2. Selectively Covered Journals

Journals of high quality that, while not concerned entirely with education, regularly contain some education-related articles, are processed selectively, i.e., articles *not* related to education are excluded, as are the miscellaneous types of materials referred to above in the explanation of comprehensive coverage. Conversely, all education-related articles appearing in such journals *are* covered. Journals covered selectively appear in the *"Source Journal Index"* without an asterisk.

3. "Oneshot" Journals

Journals of high quality that occasionally may contain an article related to education are covered on a "oneshot" basis. These journals are not regularly monitored or indexed by any Clearinghouse. Detecting a relevant article in such a journal will often be accidental and fortuitous. It is permissible for a Clearinghouse to input any good quality, education-related article that may be found in a journal not regularly covered by CIJE. Journals of this type, from which oneshot articles are chosen, do not appear in the "Source Journal Index."

Articles of this type should be identified by writing "oneshot" in the comments column of the Clearinghouses Accession Log Sheet.

If the journal from which the "oneshot" article is being taken is not well known, it may be helpful to the user to include in the cataloging the address of the journal. This decision is up to the Clearinghouse.

If a Clearinghouse finds that it is indexing one or more articles from each issue of such a journal, it should consider the journal for possible selective coverage status.

H. Acquisitions Data Report (ADR) for Duplicate Checking

1. General

Because of the decentralized nature of the ERIC system, it is necessary to devise an effective way for each Clearinghouse to be able to check on documents that are being processed by other Clearinghouses. The differing subject specializations of each Clearinghouse are not enough to avoid potential duplicate processing efforts. Document topics often overlap Clearinghouse scope areas and it is not unusual for two or more Clearinghouses to feel equally justified in processing the same document.

The *Acquisitions Data Report* (ADR) is intended to eliminate the processing of duplicate documents. The ADR is a file of titles representing documents recently acquired by the Clearinghouses that are still "in process." Documents may be at virtually any stage of the processing cycle: evaluation, selection, reproduction release, accessioning, cataloging, indexing, abstracting, document preparation (for filming), etc. The minimum requirement is that a document must at least have been assigned a temporary Clearinghouse Accession Number, since that is its basic identifying "tag" in the ADR system.

"In-Process" document titles are reported to the ERIC Facility preferably at least twice a month. The Facility combines all Clearinghouse reports into a single alphabetic file, asterisks the "potential duplicates," and feeds back a "potential duplicates" report to the Clearinghouses.

The purpose of the ADR is to provide a mechanism for the ERIC Clearinghouses to identify documents that other ERIC units are processing, in order to avoid duplicate processing of those same documents. When a Clearinghouse finds that a document it has obtained is also being processed by another Clearinghouse, it should contact the other Clearinghouse to negotiate which should most appropriately process the document in question. Automated duplicate checking is currently done on the basis of document title, the one data element that all documents have and therefore the best method of identifying potential duplicates. Titles are matched against each other, with titles having thirty identical characters being tagged as "potential duplicates," (with the final determination to be made intellectually).

2. Accessibility

The ADR is accessible to the Clearinghouses in two forms:

a. An online file of all in-process titles reported for the past year. The online ADR is a real-time online system enabling Clearinghouses to interrogate and update the file daily or weekly, as they choose. The online ADR file is housed on a microcomputer at the ERIC Facility. This microcomputer operates 24 hours a day, 7 days a week, so that it can be accessed by a Clearinghouse at any time. Clearinghouses can interrogate the file for individual titles and can add individual titles to the file, both in real time. Clearinghouses also can choose to add titles in a batch file to the ADR. When the batch file update option is selected, the update process takes place during the upcoming evening hours, after 11 p.m. A Clearinghouse can obtain a report on duplicates in the previous night's input by dialing into the system the next day.

b. A monthly printed form consisting of an alphabetic display of all titles reported for a running six-month prior period (e.g., January-June, February-July, March-August, etc.)

3. Sample ADR Records (CH#, Pagination, Date, Disposition, Title)

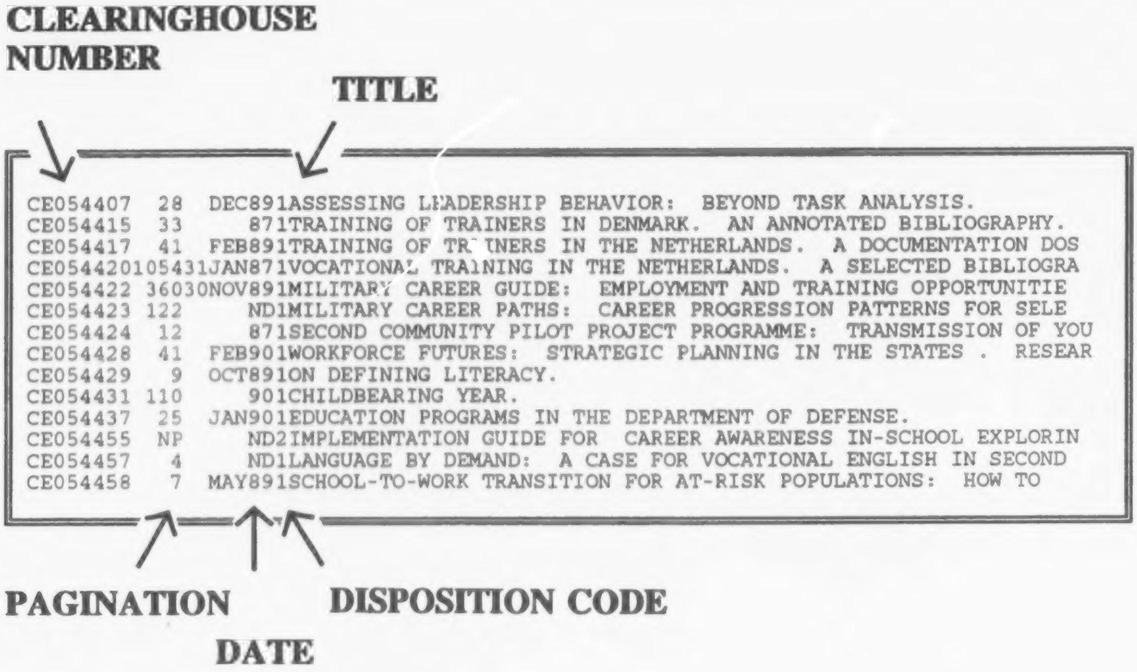
The following text describes the format of individual ADR records. The record format remains the same whether records are being reported to the Facility in paper form, on a floppy disk (as a straight ASCII file), via an online transmission at the same time as RIE/CIJE data (but as a separate file), or directly into the ADR online system. the ERIC Facility will accept ADR data via any of the above routes.

An ADR title record consists of a single string of data, 80 characters in length, made up of five distinct elements, as follows:

Dedicated Characters	Data	Example
8	**Clearinghouse Accession Number** (two alpha, six numeric) Begins in **Position 1**. Unique identifying number; should never be repeated.	CE123456
4	**Pagination** Begins in **Position 9**, immediately after the accession number. All numerics, right justified within the allocated space. In the case of a document with numbered pages, use the last numbered page. In the case of an unnumbered document, estimate the pages as closely as possible.	325
7	**Publication Date (DDMMMYY)** Begins in **Position 13** immediately after the Pagination. Right justify with the allocated space. Do not use brackets or parentheses for supplied dates. If a document has no date and none can be inferred from internal evidence, it is acceptable to record "ND" (no date).	09MAY92
1	**Disposition** **Position 20** 1 = Selected for RIE. Immediate processing possible 2 = Selected for RIE. Processing delayed; must be held for release or other temporary reason. 3 = Selected for RIE. Processing could not be completed.	1
60	**Title** Begin in **Position 21**. Record as much of the title as will fit in the 60 spaces allotted for it. Do not stop prematurely. Leading articles (a, an, the) are ignored by the system for filing and duplicate checking purposes.	America 2000

The purpose behind including Pagination and Publication Date in ADR records is to provide some additional bibliographic elements that might help distinguish between two or more items having the same title.

Since ADR records are often created by clerical or secretarial staff, titles should simply be recorded as shown on the document, without undue concern about following complicated cataloging rules, e.g., parallel titles, series titles, English translations of foreign titles, etc. that might come into play later if the document is processed.


CLEARINGHOUSE NUMBER
TITLE
PAGINATION
DISPOSITION CODE
DATE

```
CE054407  28  DEC891ASSESSING LEADERSHIP BEHAVIOR:  BEYOND TASK ANALYSIS.
CE054415  33     871TRAINING OF TRAINERS IN DENMARK.  AN ANNOTATED BIBLIOGRAPHY.
CE054417  41  FEB891TRAINING OF TRAINERS IN THE NETHERLANDS.  A DOCUMENTATION DOS
CE05442010543lJAN871VOCATIONAL TRAINING IN THE NETHERLANDS.  A SELECTED BIBLIOGRA
CE054422 36030NOV891MILITARY CAREER GUIDE:  EMPLOYMENT AND TRAINING OPPORTUNITIE
CE054423 122     ND1MILITARY CAREER PATHS:  CAREER PROGRESSION PATTERNS FOR SELE
CE054424  12     871SECOND COMMUNITY PILOT PROJECT PROGRAMME:  TRANSMISSION OF YOU
CE054428  41  FEB901WORKFORCE FUTURES:  STRATEGIC PLANNING IN THE STATES .  RESEAR
CE054429   9  OCT891ON DEFINING LITERACY.
CE054431 110     901CHILDBEARING YEAR.
CE054437  25  JAN901EDUCATION PROGRAMS IN THE DEPARTMENT OF DEFENSE.
CE054455  NP     ND2IMPLEMENTATION GUIDE FOR  CAREER AWARENESS IN-SCHOOL EXPLORIN
CE054457   4     ND1LANGUAGE BY DEMAND:  A CASE FOR VOCATIONAL ENGLISH IN SECOND
CE054458   7  MAY891SCHOOL-TO-WORK TRANSITION FOR AT-RISK POPULATIONS:  HOW TO
```

4. How to Report ADR Data

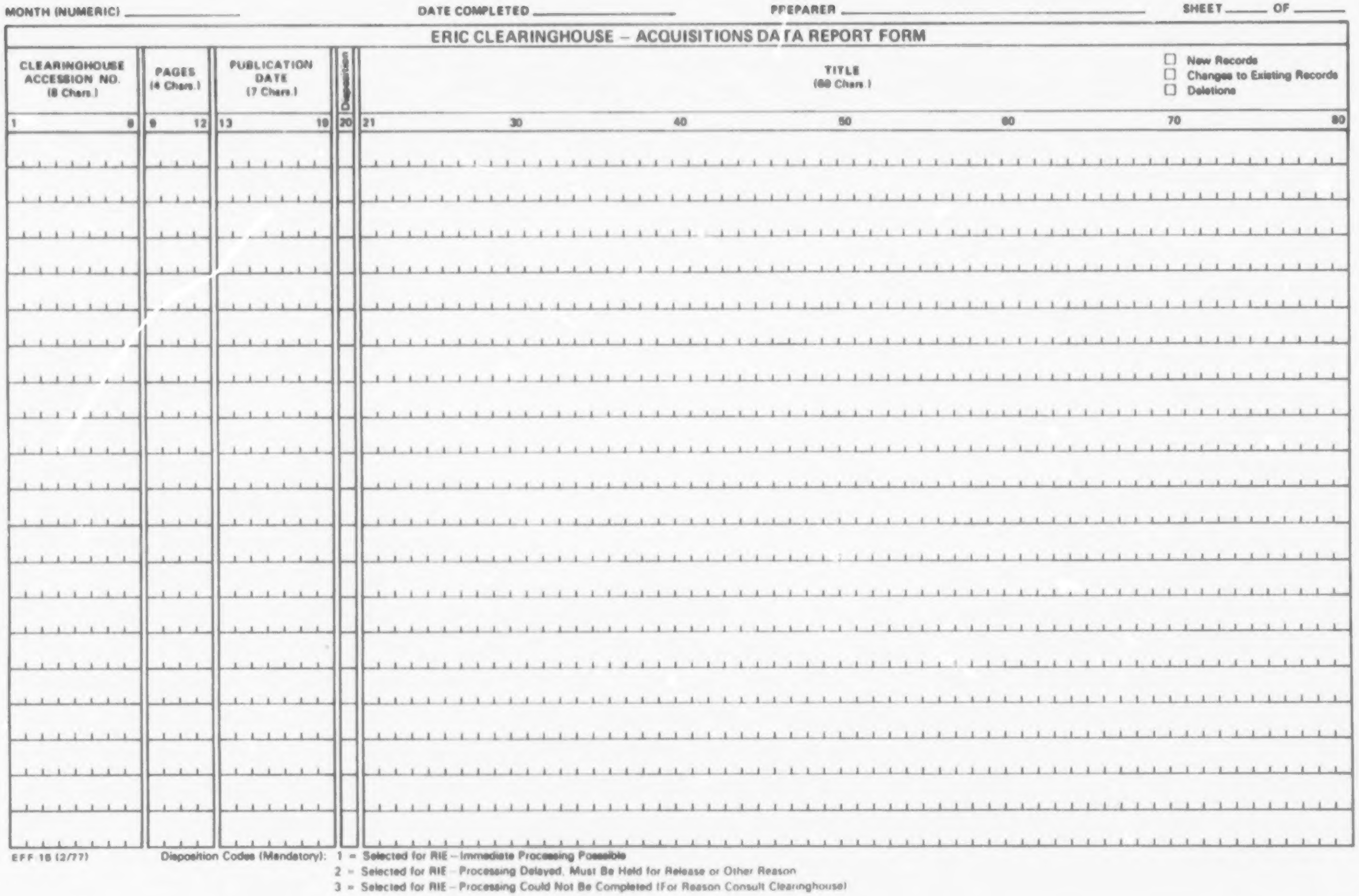
ADR title records for in-process documents may be reported in paper form on the ADR Input Form (see **Figure II-9(A) and (B)**) or, preferably, in machine-readable equivalent records. The machine-readable records may be sent to the Facility on floppy disk, as a component of the regular weekly online transmission of RIE/CIJE data, or as an update (individual title or batch of titles) to the ADR online system.

Section IX of the *ERIC Processing Manual*, on "Data Entry," covers ADR data entry in complete detail. The ADR online has its own separate explanatory documentation. Basically the file of titles to be reported should be created and identified separately on the Clearinghouse's microcomputer. The Clearinghouse should then connect with the ADR online and, following the instructions provided by the system, transmit the new title file data.

BASIC INFORMATION

ADR Online Telephone Number: 1-301-417-0963
(Keyed as: **ATDT13014170963** Long Distance; **ATDT4170963** (Local MD Area)

ID:	Each ERIC Component will be identified by their standard two-character prefix, e.g., CE, CS, etc. The system also asks for the CH Prefix directly at a later point.
PASSWORD:	Each ERIC Component will be assigned *up* to a six-character Password. For mnemonic purposes, this Password will be based on the Director's name, e.g., "*Rudner*." Individual users will not be specifically identified.
Time Allotment:	Each user will be allotted no more than 30 minutes per session in order to prevent any one user from tying up the system excessively.



MONTH (NUMERIC) ____________ DATE COMPLETED ____________ PREPARER ____________ SHEET ____ OF ____

ERIC CLEARINGHOUSE – ACQUISITIONS DATA REPORT FORM

CLEARINGHOUSE ACCESSION NO. (8 Chars.)	PAGES (4 Chars.)	PUBLICATION DATE (7 Chars.)	Disposition	TITLE (60 Chars.)	☐ New Records ☐ Changes to Existing Records ☐ Deletions
1 8	9 12	13 19	20	21 30 40 50 60	70 80

EFF 16 (2/77)

Disposition Codes (Mandatory):
1 = Selected for RIE – Immediate Processing Possible
2 = Selected for RIE – Processing Delayed, Must Be Held for Release or Other Reason
3 = Selected for RIE – Processing Could Not Be Completed (For Reason Consult Clearinghouse)

FIGURE II-9A - ADR Input Form

MONTH (NUMERIC) ____________ DATE COMPLETED ____________ PREPARER ____________ SHEET ____ OF ____

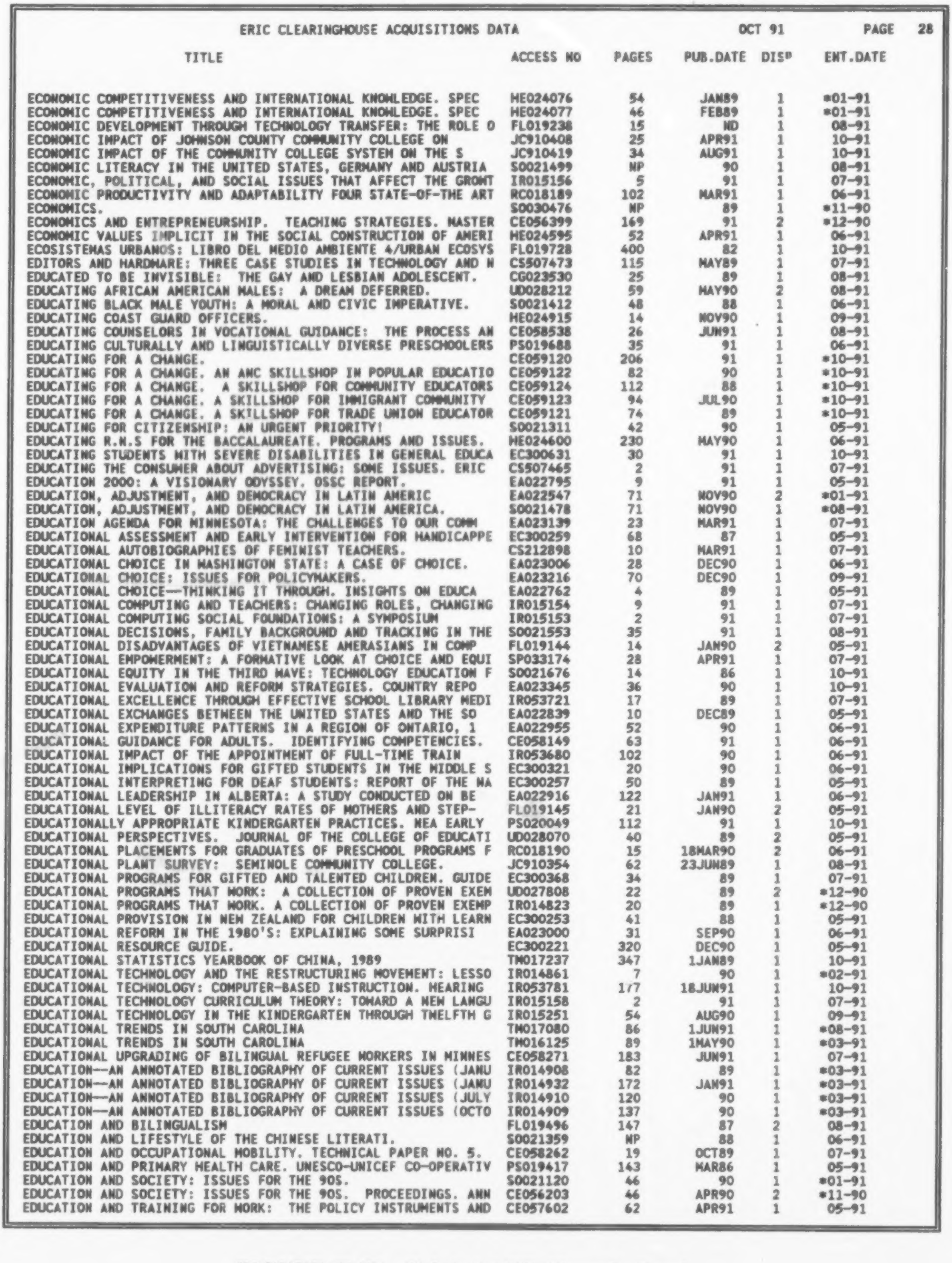
ERIC CLEARINGHOUSE – ACQUISITIONS DATA REPORT FORM

SAMPLE ENTRIES:

	CLEARINGHOUSE ACCESSION NO. (8 Chars.)	PAGES (4 Chars.)	PUBLICATION DATE (7 Chars.)	Disposition	TITLE (60 Chars.)
	1 … 8	9 … 12	13 … 19	20	21 … 30 … 40 … 50 … 60 … 70 … 80
BLOCK PRINTED →	AA123456	9999	15MAY77	1	FEDERAL TEXTBOOK ON CITIZENSHIP: OUR CONSTITUTION AND VOL. 1
TYPED →	AB987654	210	JUN78	2	CROSS-CULTURAL APPROACHES: READINGS IN LINGUISTICS

RULES FOR ENTRY OF DATA:

1. Data may be block lettered or typed. When lettering, follow the indicated spacing for clarity. When typing, the space marks may be ignored.
2. Observe the maximum number of characters indicated in the column heading for each of the fixed length fields (columns 1-20).
3. Punctuation and special characters may be used only in the title field.
4. Pagination need not be exact, but may be the number given on the last sequentially-numbered page of the document. Unpaginated documents should be described as "NP" (not paginated), if over 10 pages. Pagination here is intended only to provide a basis for comparison between two or more potential duplicates.
5. Recording of a "Disposition Code" is optional. Clearinghouses should use the ADR for all RIE candidates, but may use it for other accessions as well.
6. Enter the title exactly as it appears on the document, including initial articles, punctuation, and special characters (e.g., quotation marks, parentheses). This simple rule will facilitate both the original making of entries and the later comparison of titles. A maximum of 60 characters of the title will be recorded. If you should type more than 60 characters on the form, the excess characters will be deleted. Documents with titles that are the same for their entire length, or for more than 60 characters, should be distinguished from one another by title truncation and the addition of some distinguishing data, e.g., Vol. 1, Vol. 2, etc.



```
                    ERIC CLEARINGHOUSE ACQUISITIONS DATA                    OCT 91          PAGE   28
              TITLE                                       ACCESS NO    PAGES    PUB.DATE  DISP    ENT.DATE


ECONOMIC COMPETITIVENESS AND INTERNATIONAL KNOWLEDGE. SPEC   HE024076      54       JAN89     1      *01-91
ECONOMIC COMPETITIVENESS AND INTERNATIONAL KNOWLEDGE. SPEC   HE024077      46       FEB89     1      *01-91
ECONOMIC DEVELOPMENT THROUGH TECHNOLOGY TRANSFER: THE ROLE O FL019238      15          ND     1       08-91
ECONOMIC IMPACT OF JOHNSON COUNTY COMMUNITY COLLEGE ON       JC910408      25       APR91     1       10-91
ECONOMIC IMPACT OF THE COMMUNITY COLLEGE SYSTEM ON THE S     JC910419      34       AUG91     1       10-91
ECONOMIC LITERACY IN THE UNITED STATES, GERMANY AND AUSTRIA  SO021499      NP          90     1       08-91
ECONOMIC, POLITICAL, AND SOCIAL ISSUES THAT AFFECT THE GROWT IR015156       5          91     1       07-91
ECONOMIC PRODUCTIVITY AND ADAPTABILITY FOUR STATE-OF-THE ART RC018189     102       MAR91     1       06-91
ECONOMICS.                                                   SO030476      NP          89     1      *11-90
ECONOMICS AND ENTREPRENEURSHIP.  TEACHING STRATEGIES. MASTER CE056399     169          91     2      *12-90
ECONOMIC VALUES IMPLICIT IN THE SOCIAL CONSTRUCTION OF AMERI HE024595      52       APR91     1       06-91
ECOSISTEMAS URBANOS: LIBRO DEL MEDIO AMBIENTE 4/URBAN ECOSYS FL019728     400          82     1       10-91
EDITORS AND HARDWARE: THREE CASE STUDIES IN TECHNOLOGY AND W CS507473     115       MAY89     1       07-91
EDUCATED TO BE INVISIBLE:  THE GAY AND LESBIAN ADOLESCENT.   CG023530      25          89     1       08-91
EDUCATING AFRICAN AMERICAN MALES:  A DREAM DEFERRED.         UD028212      59       MAY90     2       08-91
EDUCATING BLACK MALE YOUTH: A MORAL AND CIVIC IMPERATIVE.    SO021412      48          88     1       06-91
EDUCATING COAST GUARD OFFICERS.                              HE024915      14       NOV90     1       09-91
EDUCATING COUNSELORS IN VOCATIONAL GUIDANCE:  THE PROCESS AN CE058538      26       JUN91     1       08-91
EDUCATING CULTURALLY AND LINGUISTICALLY DIVERSE PRESCHOOLERS PS019688      35          91     1       06-91
EDUCATING FOR A CHANGE.                                      CE059120     206          91     1      *10-91
EDUCATING FOR A CHANGE. AN ANC SKILLSHOP IN POPULAR EDUCATIO CE059122      82          90     1      *10-91
EDUCATING FOR A CHANGE.  A SKILLSHOP FOR COMMUNITY EDUCATORS CE059124     112          88     1      *10-91
EDUCATING FOR A CHANGE. A SKILLSHOP FOR IMMIGRANT COMMUNITY  CE059123      94       JUL90     1      *10-91
EDUCATING FOR A CHANGE. A SKILLSHOP FOR TRADE UNION EDUCATOR CE059121      74          89     1      *10-91
EDUCATING FOR CITIZENSHIP: AN URGENT PRIORITY!               SO021311      42          90     1       05-91
EDUCATING R.N.S FOR THE BACCALAUREATE. PROGRAMS AND ISSUES.  HE024600     230       MAY90     1       06-91
EDUCATING STUDENTS WITH SEVERE DISABILITIES IN GENERAL EDUCA EC300631      30          91     1       10-91
EDUCATING THE CONSUMER ABOUT ADVERTISING: SOME ISSUES. ERIC  CS507465       2          91     1       07-91
EDUCATION 2000: A VISIONARY ODYSSEY. OSSC REPORT.            EA022795       9          91     1       05-91
EDUCATION, ADJUSTMENT, AND DEMOCRACY IN LATIN AMERIC         EA022547      71       NOV90     2      *01-91
EDUCATION, ADJUSTMENT, AND DEMOCRACY IN LATIN AMERICA.       SO021478      71       NOV90     1      *08-91
EDUCATION AGENDA FOR MINNESOTA: THE CHALLENGES TO OUR COMM   EA023139      23       MAR91     1       07-91
EDUCATIONAL ASSESSMENT AND EARLY INTERVENTION FOR HANDICAPPE EC300259      68          87     1       05-91
EDUCATIONAL AUTOBIOGRAPHIES OF FEMINIST TEACHERS.            CS212898      10       MAR91     1       07-91
EDUCATIONAL CHOICE IN WASHINGTON STATE: A CASE OF CHOICE.    EA023006      28       DEC90     1       06-91
EDUCATIONAL CHOICE: ISSUES FOR POLICYMAKERS.                 EA023216      70       DEC90     1       09-91
EDUCATIONAL CHOICE--THINKING IT THROUGH. INSIGHTS ON EDUCA   EA022762       4          89     1       05-91
EDUCATIONAL COMPUTING AND TEACHERS: CHANGING ROLES, CHANGING IR015154       9          91     1       07-91
EDUCATIONAL COMPUTING SOCIAL FOUNDATIONS: A SYMPOSIUM        IR015153       2          91     1       07-91
EDUCATIONAL DECISIONS, FAMILY BACKGROUND AND TRACKING IN THE SO021553      35          91     1       08-91
EDUCATIONAL DISADVANTAGES OF VIETNAMESE AMERASIANS IN COMP   FL019144      14       JAN90     2       05-91
EDUCATIONAL EMPOWERMENT: A FORMATIVE LOOK AT CHOICE AND EQUI SP033174      28       APR91     1       07-91
EDUCATIONAL EQUITY IN THE THIRD WAVE: TECHNOLOGY EDUCATION F SO021676      14          86     1       10-91
EDUCATIONAL EVALUATION AND REFORM STRATEGIES. COUNTRY REPO   EA023345      36          90     1       10-91
EDUCATIONAL EXCELLENCE THROUGH EFFECTIVE SCHOOL LIBRARY MEDI IR053721      17          89     1       07-91
EDUCATIONAL EXCHANGES BETWEEN THE UNITED STATES AND THE SO   EA022839      10       DEC89     1       05-91
EDUCATIONAL EXPENDITURE PATTERNS IN A REGION OF ONTARIO, 1   EA022955      52          90     1       06-91
EDUCATIONAL GUIDANCE FOR ADULTS.  IDENTIFYING COMPETENCIES.  CE058149      63          91     1       06-91
EDUCATIONAL IMPACT OF THE APPOINTMENT OF FULL-TIME TRAIN     IR053680     102          90     1       06-91
EDUCATIONAL IMPLICATIONS FOR GIFTED STUDENTS IN THE MIDDLE S EC300321      20          90     1       06-91
EDUCATIONAL INTERPRETING FOR DEAF STUDENTS: REPORT OF THE NA EC300257      50          89     1       05-91
EDUCATIONAL LEADERSHIP IN ALBERTA: A STUDY CONDUCTED ON BE   EA022916     122       JAN91     1       06-91
EDUCATIONAL LEVEL OF ILLITERACY RATES OF MOTHERS AND STEP-   FL019145      21       JAN90     2       05-91
EDUCATIONALLY APPROPRIATE KINDERGARTEN PRACTICES. NEA EARLY  PS020049     112          91     1       10-91
EDUCATIONAL PERSPECTIVES.  JOURNAL OF THE COLLEGE OF EDUCATI UD028070      40          89     2       05-91
EDUCATIONAL PLACEMENTS FOR GRADUATES OF PRESCHOOL PROGRAMS F RC018190      15     18MAR90     2       06-91
EDUCATIONAL PLANT SURVEY:  SEMINOLE COMMUNITY COLLEGE.       JC910354      62     23JUN89     1       08-91
EDUCATIONAL PROGRAMS FOR GIFTED AND TALENTED CHILDREN. GUIDE EC300368      34          89     1       07-91
EDUCATIONAL PROGRAMS THAT WORK:  A COLLECTION OF PROVEN EXEM UD027808      22          89     2      *12-90
EDUCATIONAL PROGRAMS THAT WORK. A COLLECTION OF PROVEN EXEMP IR014823      20          89     1      *12-90
EDUCATIONAL PROVISION IN NEW ZEALAND FOR CHILDREN WITH LEARN EC300253      41          88     1       05-91
EDUCATIONAL REFORM IN THE 1980'S: EXPLAINING SOME SURPRISI   EA023000      31       SEP90     1       06-91
EDUCATIONAL RESOURCE GUIDE.                                  EC300221     320       DEC90     1       05-91
EDUCATIONAL STATISTICS YEARBOOK OF CHINA, 1989               TM017237     347      1JAN89     1       10-91
EDUCATIONAL TECHNOLOGY AND THE RESTRUCTURING MOVEMENT: LESSO IR014861       7          90     1      *02-91
EDUCATIONAL TECHNOLOGY: COMPUTER-BASED INSTRUCTION. HEARING  IR053781     177     18JUN91     1       10-91
EDUCATIONAL TECHNOLOGY CURRICULUM THEORY: TOWARD A NEW LANGU IR015158       2          91     1       07-91
EDUCATIONAL TECHNOLOGY IN THE KINDERGARTEN THROUGH TWELFTH G IR015251      54       AUG90     1       09-91
EDUCATIONAL TRENDS IN SOUTH CAROLINA                         TM017080      86      1JUN91     1      *08-91
EDUCATIONAL TRENDS IN SOUTH CAROLINA                         TM016125      89      1MAY90     1      *03-91
EDUCATIONAL UPGRADING OF BILINGUAL REFUGEE WORKERS IN MINNES CE058271     183       JUN91     1       07-91
EDUCATION--AN ANNOTATED BIBLIOGRAPHY OF CURRENT ISSUES (JANU IR014908      82          89     1      *03-91
EDUCATION--AN ANNOTATED BIBLIOGRAPHY OF CURRENT ISSUES (JANU IR014932     172       JAN91     1      *03-91
EDUCATION--AN ANNOTATED BIBLIOGRAPHY OF CURRENT ISSUES (JULY IR014910     120          90     1      *03-91
EDUCATION--AN ANNOTATED BIBLIOGRAPHY OF CURRENT ISSUES (OCTO IR014909     137          90     1      *03-91
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EDUCATION AND TRAINING FOR WORK:  THE POLICY INSTRUMENTS AND CE057602      62       APR91     1       05-91
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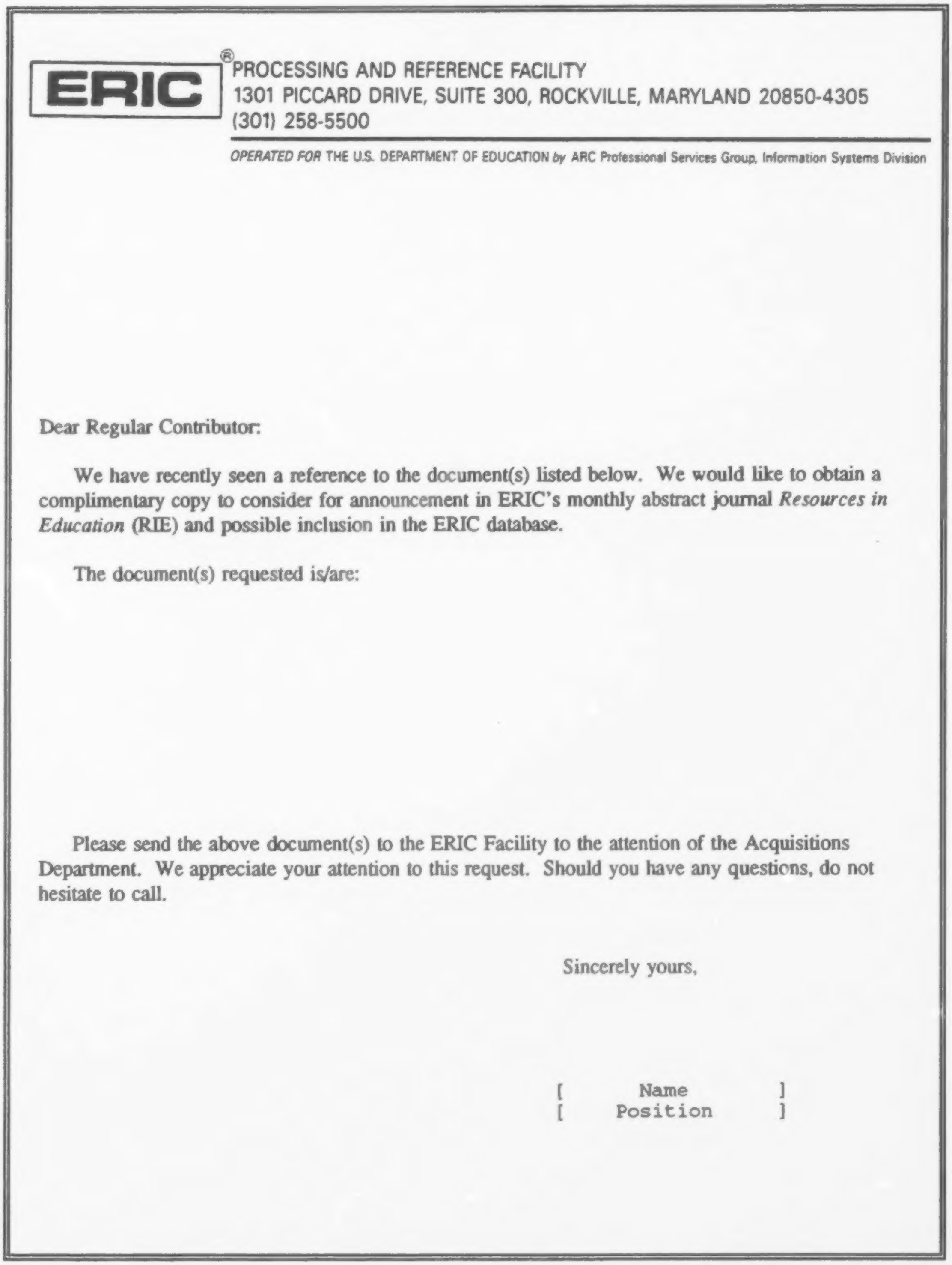
FIGURE II-9B - Printed ADR (Sample Page)



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Dear Regular Contributor:

We have recently seen a reference to the document(s) listed below. We would like to obtain a complimentary copy to consider for announcement in ERIC's monthly abstract journal *Resources in Education* (RIE) and possible inclusion in the ERIC database.

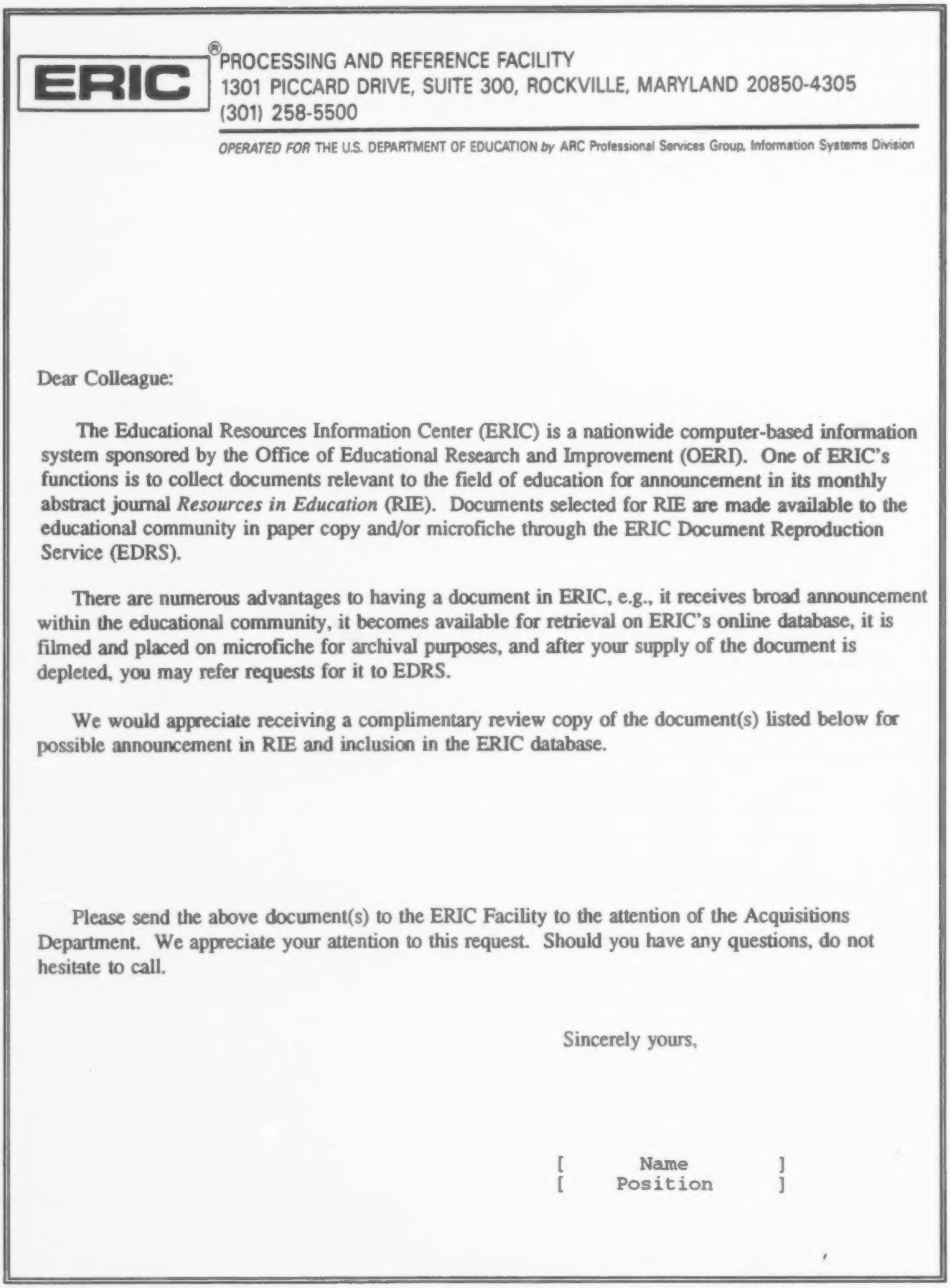
The document(s) requested is/are:

Please send the above document(s) to the ERIC Facility to the attention of the Acquisitions Department. We appreciate your attention to this request. Should you have any questions, do not hesitate to call.

Sincerely yours,

[Name]
[Position]

FIGURE II-10: ERIC Facility Form Letter
A. Request for Specific Document (by Title)



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The Educational Resources Information Center (ERIC) is a nationwide computer-based information system sponsored by the Office of Educational Research and Improvement (OERI). One of ERIC's functions is to collect documents relevant to the field of education for announcement in its monthly abstract journal *Resources in Education* (RIE). Documents selected for RIE are made available to the educational community in paper copy and/or microfiche through the ERIC Document Reproduction Service (EDRS).

There are numerous advantages to having a document in ERIC, e.g., it receives broad announcement within the educational community, it becomes available for retrieval on ERIC's online database, it is filmed and placed on microfiche for archival purposes, and after your supply of the document is depleted, you may refer requests for it to EDRS.

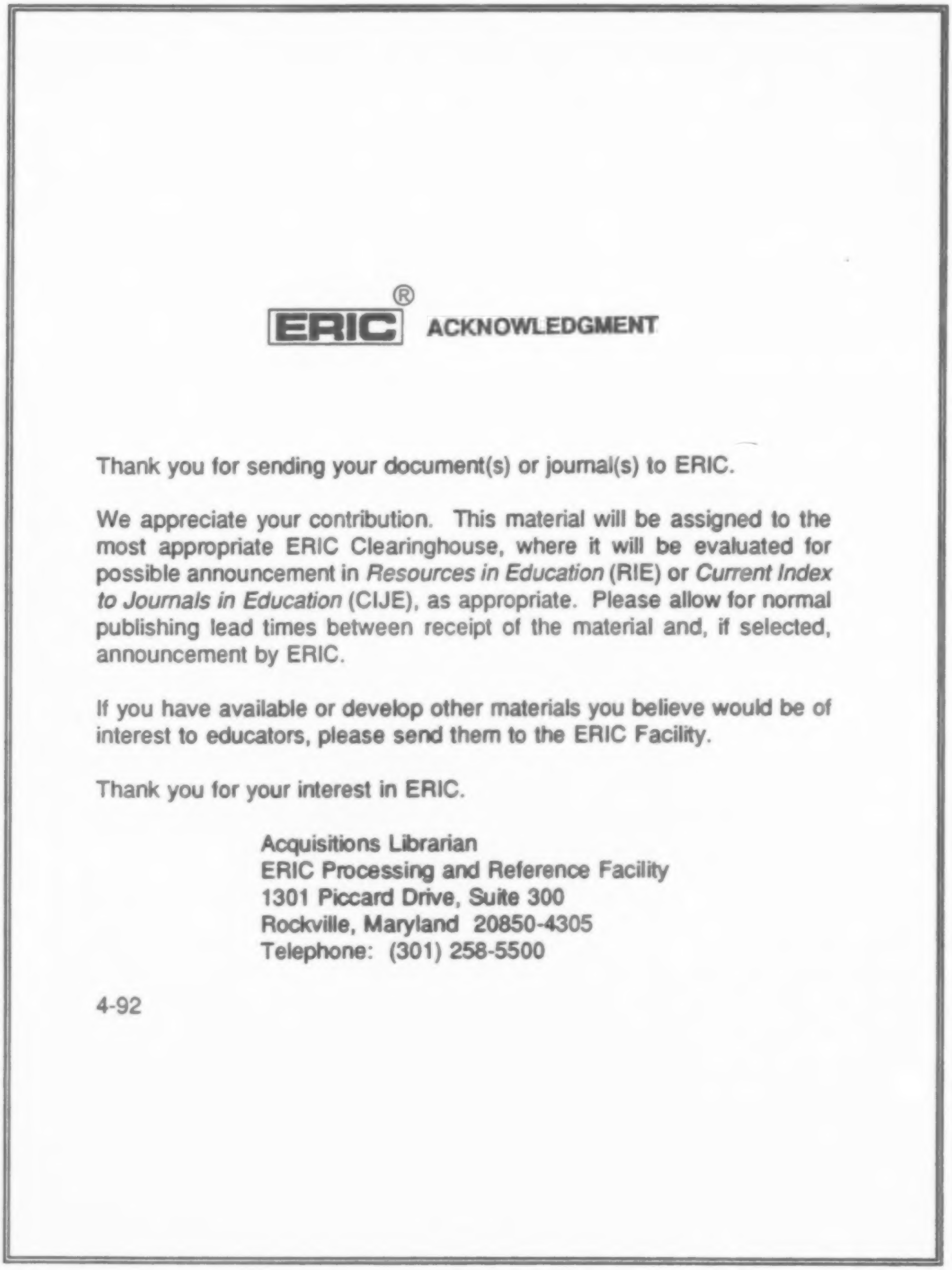
We would appreciate receiving a complimentary review copy of the document(s) listed below for possible announcement in RIE and inclusion in the ERIC database.

Please send the above document(s) to the ERIC Facility to the attention of the Acquisitions Department. We appreciate your attention to this request. Should you have any questions, do not hesitate to call.

Sincerely yours,

[Name]
[Position]

FIGURE II-10: **ERIC Form Letter**
B. General Solicitation



ERIC® ACKNOWLEDGMENT

Thank you for sending your document(s) or journal(s) to ERIC.

We appreciate your contribution. This material will be assigned to the most appropriate ERIC Clearinghouse, where it will be evaluated for possible announcement in *Resources in Education* (RIE) or *Current Index to Journals in Education* (CIJE), as appropriate. Please allow for normal publishing lead times between receipt of the material and, if selected, announcement by ERIC.

If you have available or develop other materials you believe would be of interest to educators, please send them to the ERIC Facility.

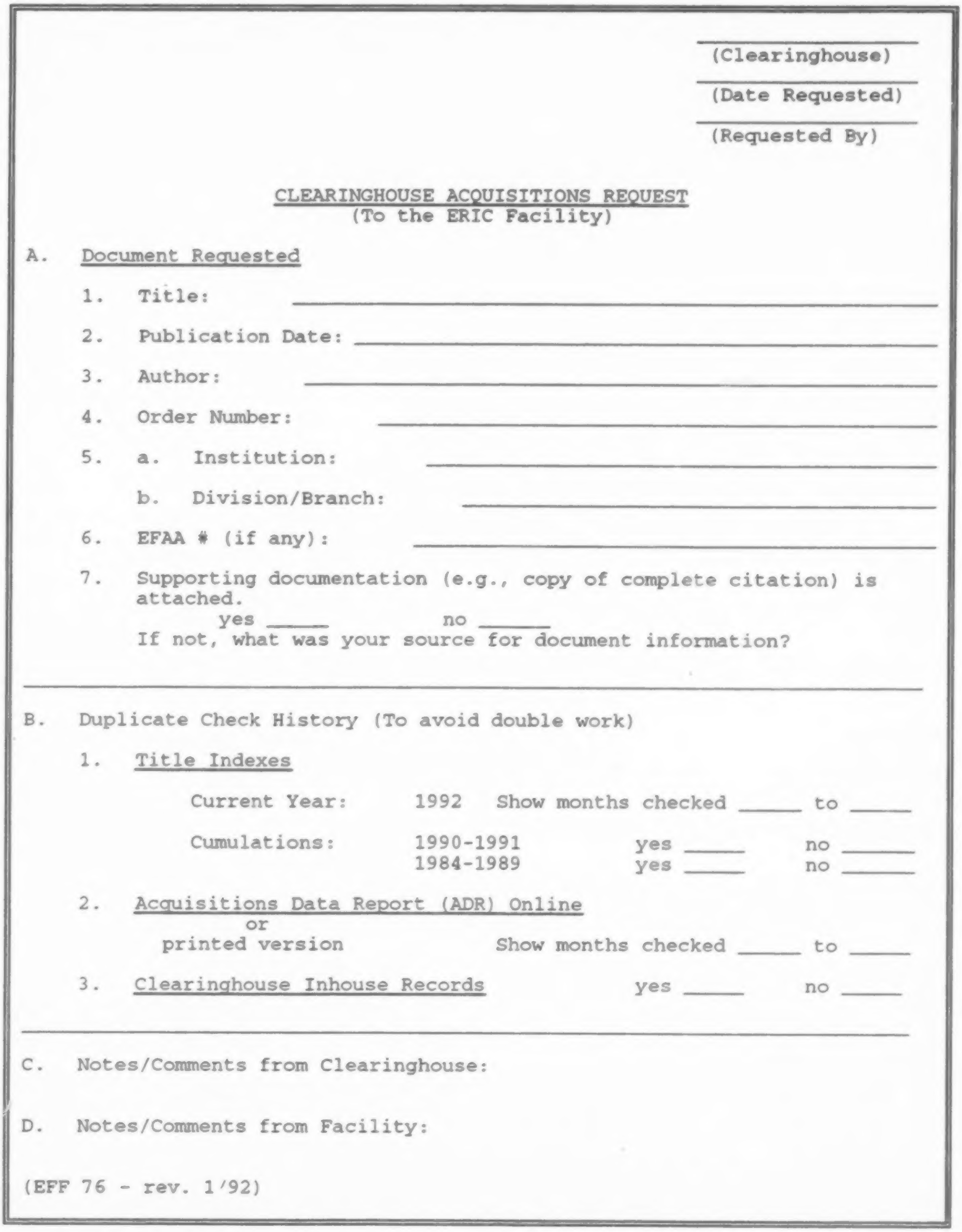
Thank you for your interest in ERIC.

Acquisitions Librarian
ERIC Processing and Reference Facility
1301 Piccard Drive, Suite 300
Rockville, Maryland 20850-4305
Telephone: (301) 258-5500

4-92

FIGURE II-10: **ERIC Form Letter**
C. "Thank You" Letter

91



____
(Clearinghouse)

____
(Date Requested)

____
(Requested By)

CLEARINGHOUSE ACQUISITIONS REQUEST
(To the ERIC Facility)

A. Document Requested

1. Title: _______________
2. Publication Date: _______________
3. Author: _______________
4. Order Number: _______________
5. a. Institution: _______________
   b. Division/Branch: _______________
6. EFAA # (if any): _______________
7. Supporting documentation (e.g., copy of complete citation) is attached.
   yes _____ no _____
   If not, what was your source for document information?

____

B. Duplicate Check History (To avoid double work)

1. Title Indexes

Current Year:	1992	Show months checked _____	to _____	
Cumulations:	1990-1991		yes _____	no _____
	1984-1989		yes _____	no _____

2. Acquisitions Data Report (ADR) Online
   or
   printed version — Show months checked _____ to _____

3. Clearinghouse Inhouse Records — yes _____ no _____

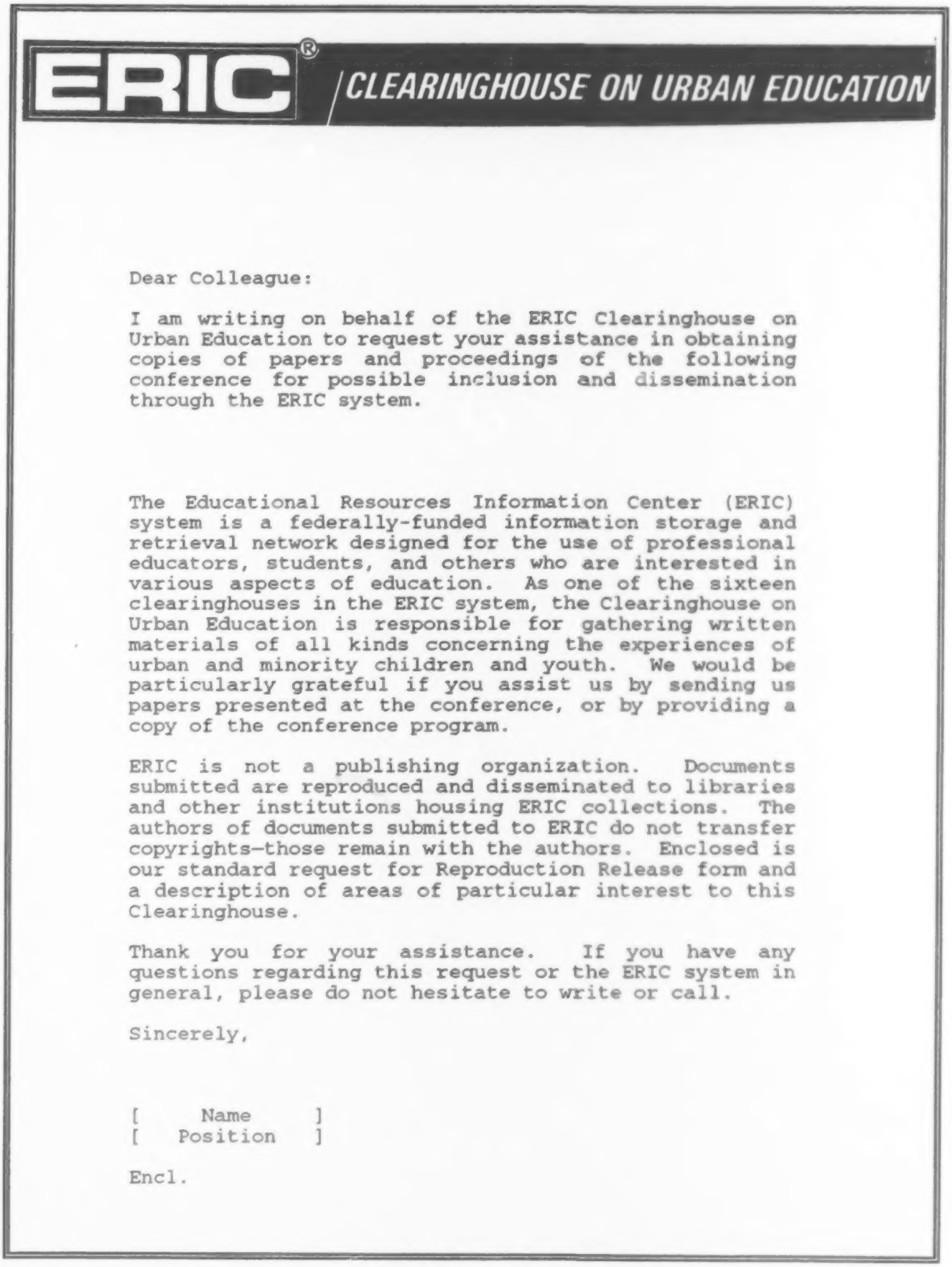
____

C. Notes/Comments from Clearinghouse:

D. Notes/Comments from Facility:

(EFF 76 - rev. 1/92)

FIGURE II-10: ERIC Form Letter
D. Clearinghouse Acquisitions Request (to Facility)
[requesting Facility to acquire document]



ERIC® CLEARINGHOUSE ON URBAN EDUCATION

Dear Colleague:

I am writing on behalf of the ERIC Clearinghouse on Urban Education to request your assistance in obtaining copies of papers and proceedings of the following conference for possible inclusion and dissemination through the ERIC system.

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ERIC is not a publishing organization. Documents submitted are reproduced and disseminated to libraries and other institutions housing ERIC collections. The authors of documents submitted to ERIC do not transfer copyrights—those remain with the authors. Enclosed is our standard request for Reproduction Release form and a description of areas of particular interest to this Clearinghouse.

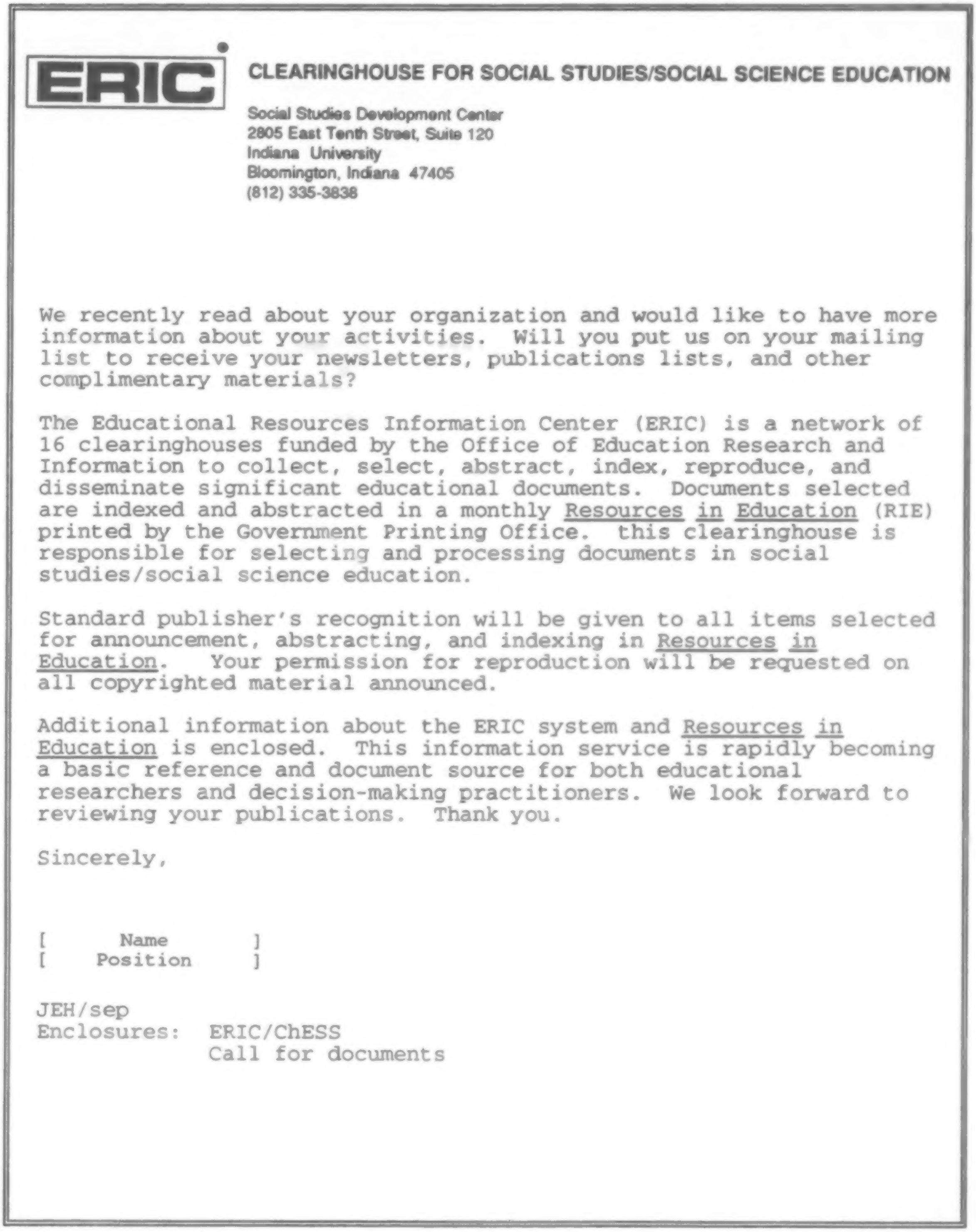
Thank you for your assistance. If you have any questions regarding this request or the ERIC system in general, please do not hesitate to write or call.

Sincerely,

[Name]
[Position]

Encl.

FIGURE II-11: Clearinghouse Acquisitions Letters (Typical)
A. Conference Documents



ERIC
CLEARINGHOUSE FOR SOCIAL STUDIES/SOCIAL SCIENCE EDUCATION

Social Studies Development Center
2805 East Tenth Street, Suite 120
Indiana University
Bloomington, Indiana 47405
(812) 335-3838

We recently read about your organization and would like to have more information about your activities. Will you put us on your mailing list to receive your newsletters, publications lists, and other complimentary materials?

The Educational Resources Information Center (ERIC) is a network of 16 clearinghouses funded by the Office of Education Research and Information to collect, select, abstract, index, reproduce, and disseminate significant educational documents. Documents selected are indexed and abstracted in a monthly Resources in Education (RIE) printed by the Government Printing Office. this clearinghouse is responsible for selecting and processing documents in social studies/social science education.

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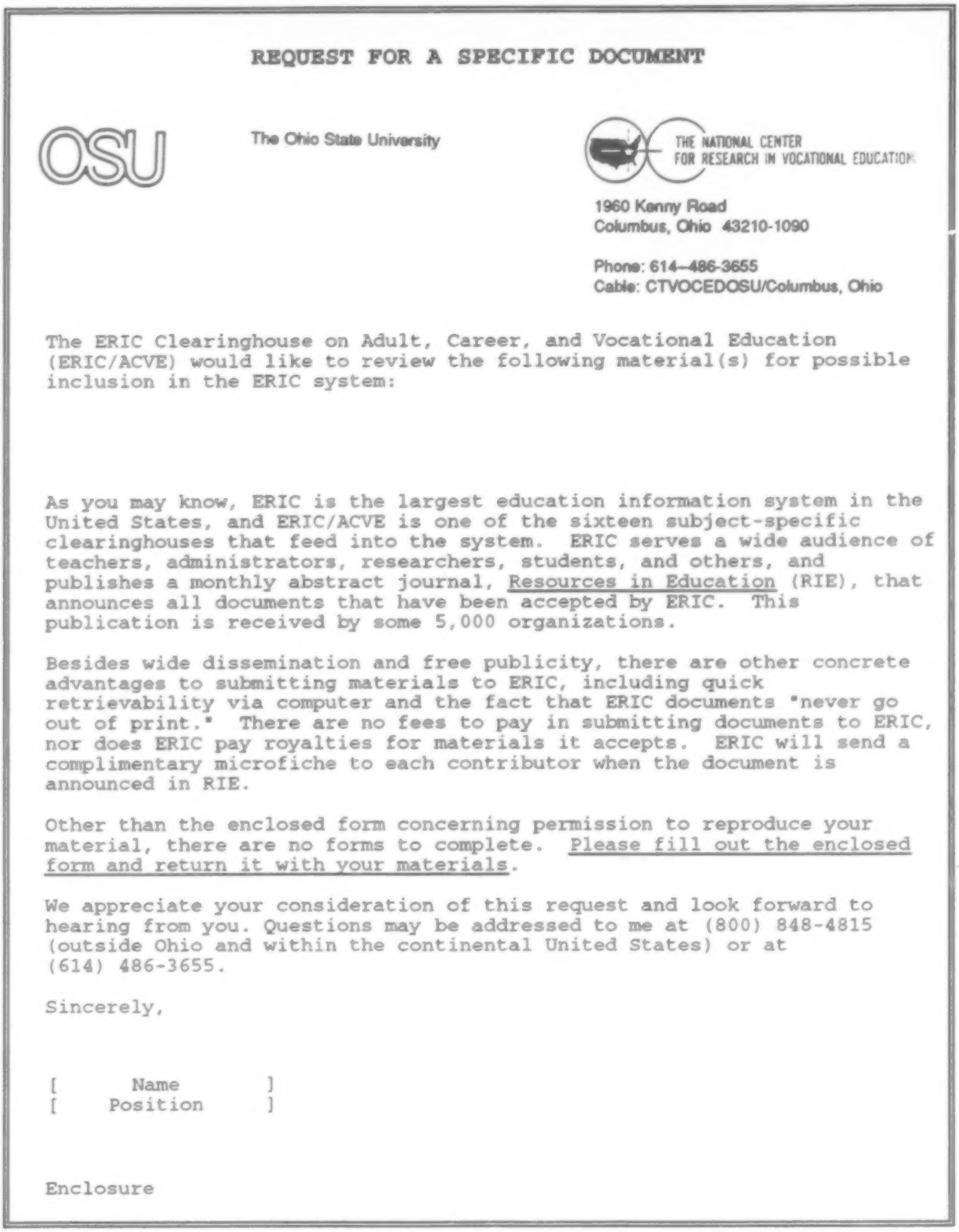
Additional information about the ERIC system and Resources in Education is enclosed. This information service is rapidly becoming a basic reference and document source for both educational researchers and decision-making practitioners. We look forward to reviewing your publications. Thank you.

Sincerely,

[Name]
[Position]

JEH/sep
Enclosures: ERIC/ChESS
Call for documents

FIGURE II-11: Clearinghouse Acquisitions Letters (Typical)
B. Non-Profit Organizations



REQUEST FOR A SPECIFIC DOCUMENT

OSU
The Ohio State University

THE NATIONAL CENTER
FOR RESEARCH IN VOCATIONAL EDUCATION

1960 Kenny Road
Columbus, Ohio 43210-1090

Phone: 614-486-3655
Cable: CTVOCEDOSU/Columbus, Ohio

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Besides wide dissemination and free publicity, there are other concrete advantages to submitting materials to ERIC, including quick retrievability via computer and the fact that ERIC documents "never go out of print." There are no fees to pay in submitting documents to ERIC, nor does ERIC pay royalties for materials it accepts. ERIC will send a complimentary microfiche to each contributor when the document is announced in RIE.

Other than the enclosed form concerning permission to reproduce your material, there are no forms to complete. Please fill out the enclosed form and return it with your materials.

We appreciate your consideration of this request and look forward to hearing from you. Questions may be addressed to me at (800) 848-4815 (outside Ohio and within the continental United States) or at (614) 486-3655.

Sincerely,

[Name]
[Position]

Enclosure

FIGURE II-11: Clearinghouse Acquisitions Letters (Typical)
C. General Solicitation

We are pleased to inform you that your document entitled:

____

has been selected to be cited in the ________________issue of Resources in Education

and has been assigned the document number: ______________________________.

We actively solicit documents pertaining to higher education and we hope that yo will encourage your colleagues to send us their papers and reports on any facet of higher education.

Sincerely,
ERIC Clearinghouse on Higher Education
The George Washington University

FIGURE II-11: Clearinghouse Acquisitions Letters (Typical)
D. Reply Card

We would like to review your work for possible inclusion in the ERIC (Educational Resources Information Center) database.

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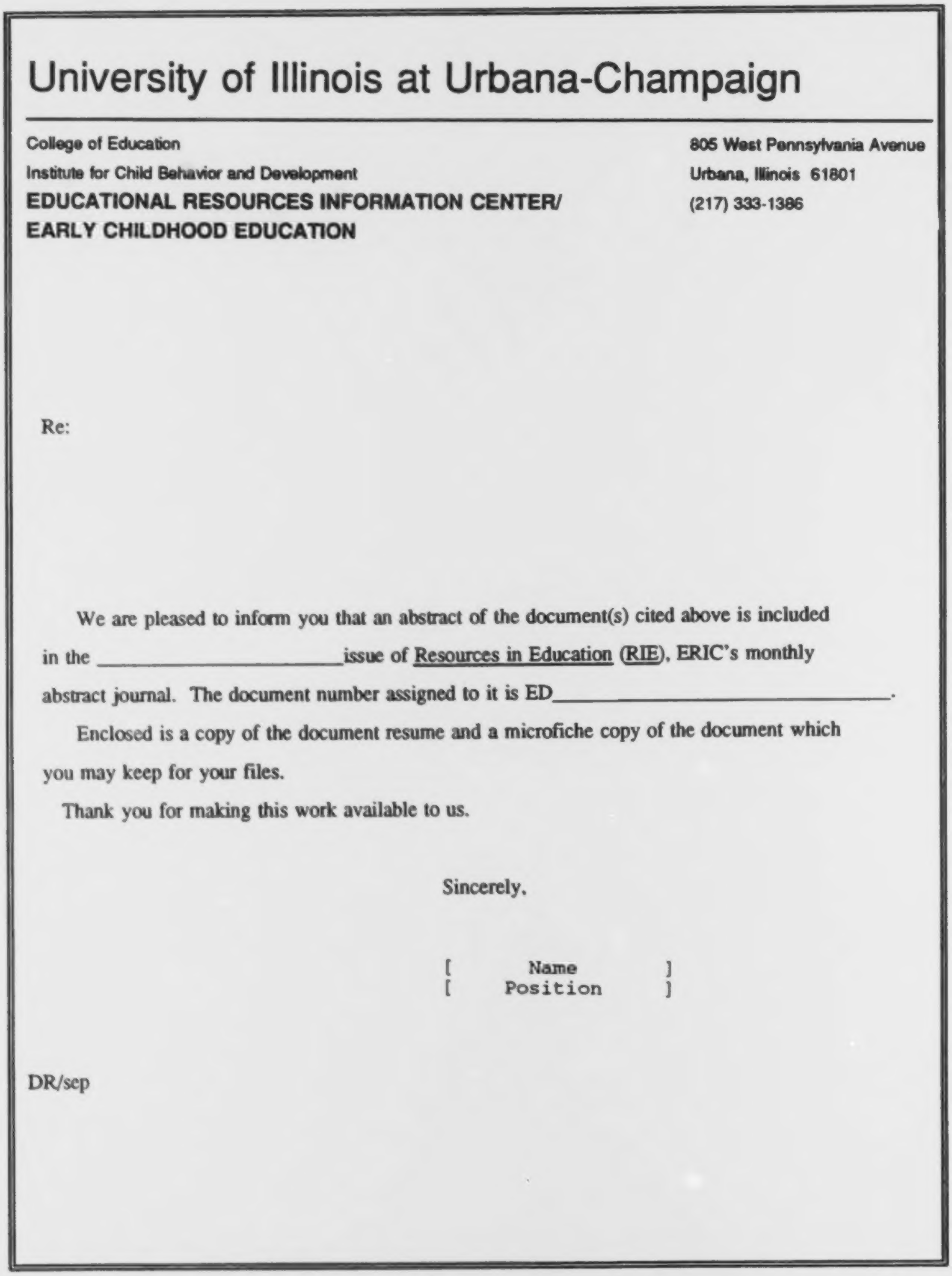
Contributors to ERIC benefit by having their papers announced in the abstract index Resources in Education (RIE) and added, in microfiche form, to ERIC collections in over 70 libraries and research centers around the world.

Because all documents announced in RIE must be available to the public, either through the ERIC Document Reproduction Service or through a clearly specifiable alternative source, we need a signed release form for each document. The release merely gives ERIC permission to reproduce the paper; it does not affect your copyright status.

We hope that you will take advantage of this opportunity to share your work with two copies of the paper. The work should be sharply printed on light paper to ensure legible microfiche.

FIGURE II-11: Clearinghouse Acquisitions Letters (Typical)
E. Reproduction Release Request



University of Illinois at Urbana-Champaign

College of Education
Institute for Child Behavior and Development
EDUCATIONAL RESOURCES INFORMATION CENTER/
EARLY CHILDHOOD EDUCATION

805 West Pennsylvania Avenue
Urbana, Illinois 61801
(217) 333-1386

Re:

We are pleased to inform you that an abstract of the document(s) cited above is included in the ______________________issue of Resources in Education (RIE), ERIC's monthly abstract journal. The document number assigned to it is ED________________________________.

Enclosed is a copy of the document resume and a microfiche copy of the document which you may keep for your files.

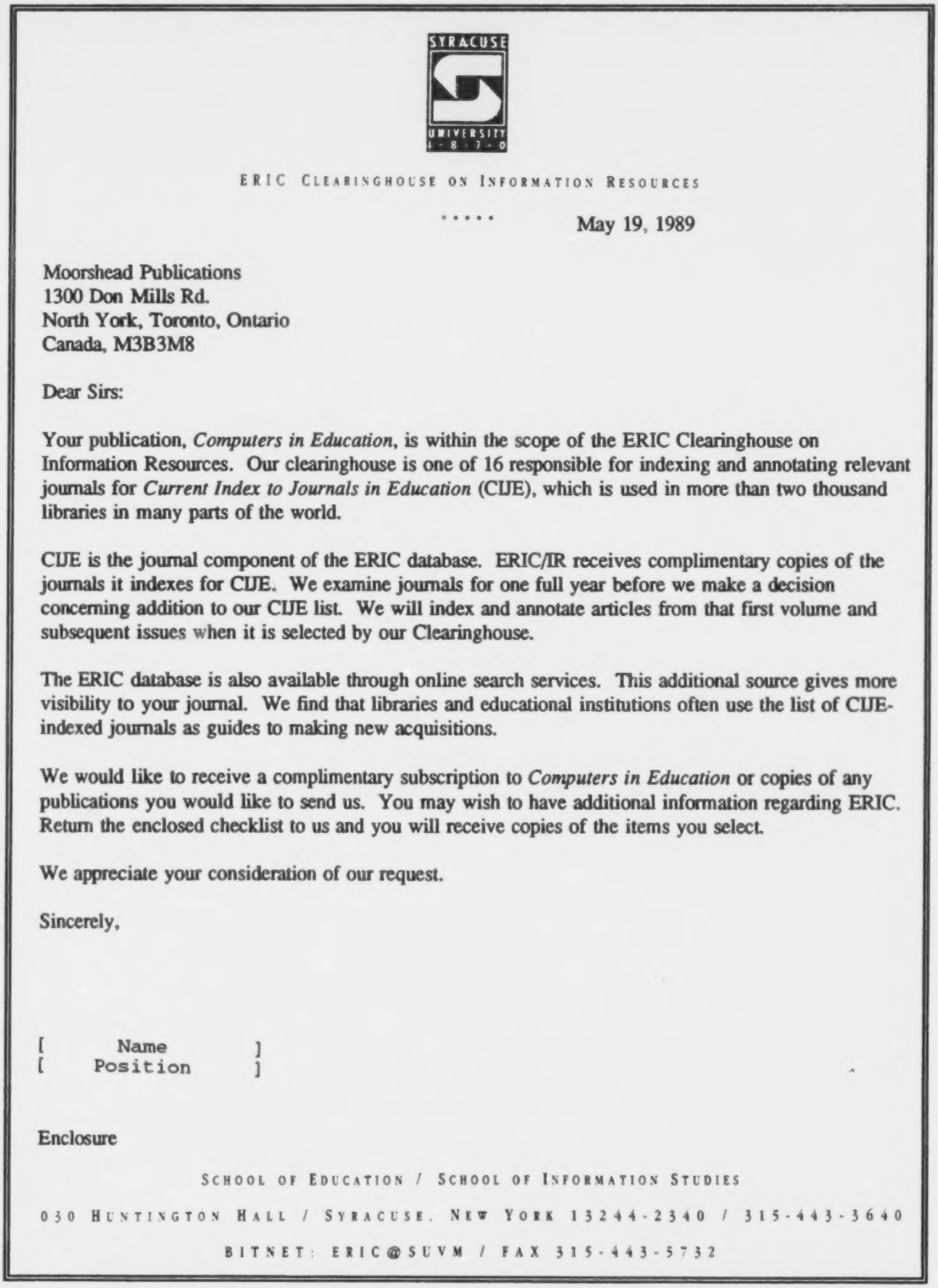
Thank you for making this work available to us.

Sincerely,

[Name]
[Position]

DR/sep

FIGURE II-11: Clearinghouse Acquisitions Letters (Typical)
F. Complimentary Microfiche to Author/Source



SYRACUSE UNIVERSITY 1870

ERIC CLEARINGHOUSE ON INFORMATION RESOURCES

May 19, 1989

Moorshead Publications
1300 Don Mills Rd.
North York, Toronto, Ontario
Canada, M3B3M8

Dear Sirs:

Your publication, *Computers in Education*, is within the scope of the ERIC Clearinghouse on Information Resources. Our clearinghouse is one of 16 responsible for indexing and annotating relevant journals for *Current Index to Journals in Education* (CIJE), which is used in more than two thousand libraries in many parts of the world.

CIJE is the journal component of the ERIC database. ERIC/IR receives complimentary copies of the journals it indexes for CIJE. We examine journals for one full year before we make a decision concerning addition to our CIJE list. We will index and annotate articles from that first volume and subsequent issues when it is selected by our Clearinghouse.

The ERIC database is also available through online search services. This additional source gives more visibility to your journal. We find that libraries and educational institutions often use the list of CIJE-indexed journals as guides to making new acquisitions.

We would like to receive a complimentary subscription to *Computers in Education* or copies of any publications you would like to send us. You may wish to have additional information regarding ERIC. Return the enclosed checklist to us and you will receive copies of the items you select.

We appreciate your consideration of our request.

Sincerely,

[Name]
[Position]

Enclosure

SCHOOL OF EDUCATION / SCHOOL OF INFORMATION STUDIES
030 HUNTINGTON HALL / SYRACUSE, NEW YORK 13244-2340 / 315-443-3640
BITNET: ERIC@SUVM / FAX 315-443-5732

FIGURE II-11: Clearinghouse Acquisitions Letters (Typical)
G. Complimentary Journal Subscription Request

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Submitting Documents to ERIC

What Kinds of Documents to Send ERIC

ERIC would like to be given the opportunity to examine virtually any document dealing with education or its aspects. The ERIC audience is so broad (encompassing teachers, administrators, supervisors, librarians, researchers, media specialists, counselors, and every other type of educator, as well as students and parents) that it must collect a wide variety of documentation in order to satisfy its users. Examples of the kinds of education-related materials collected are the following:

- Research/Technical Reports
- Program/Project Descriptions
- Opinion Papers, Essays, Position Papers
- Monographs, Treatises
- Speeches and Presentations
- Evaluation Studies
- Feasibility Studies
- State of the Art Studies
- Instructional Materials
- Syllabi
- Teaching Guides
- Resource Guides
- Manuals
- Handbooks
- Curriculum Materials
- Conference Papers
- Bibliographies
- Legislation and Regulations
- Texts, Questionnaires, Measurement Devices
- Vocabularies, Dictionaries, Glossaries, Thesauri
- Statistical Compilations
- Taxonomies and Classifications
- Dissertations

ERIC does not accept non-print materials (such as films, filmstrips, videotapes, tapes, records, cassettes, etc.). However, if such material accompanies a printed text, ERIC may process the printed text and refer the user to the accompanying non-print components, as long as a source of availability for them can be cited.

A document does not have to be formally published to be entered into the ERIC database. In fact, ERIC seeks out the unpublished or *"fugitive"* material not usually available through conventional library channels.

Selection Criteria Employed by ERIC

• QUALITY OF CONTENT

All documents received are evaluated by subject experts against the following kinds of quality criteria: contribution to knowledge, significance, relevance, newness, innovativeness, effectiveness of presentation, thoroughness of reporting, relation to current priorities, timeliness, authority of source, intended audience, and comprehensiveness.

• LEGIBILITY AND REPRODUCIBILITY

Documents may be type-set, typewritten, xeroxed, or otherwise duplicated. They must be legible and easily readable. Letters should be clearly formed and with sufficient contrast to the paper background to permit filming. Colored inks and colored papers can create serious reproduction problems. Standard 8½"x 11" size pages are preferred.

Two copies are desired, if possible: one for processing into the system and eventual filming, the other for retention and possible use by the appropriate Clearinghouse while processing is going on. However, single copies are acceptable.

• REPRODUCTION RELEASE

For each document submitted, ERIC requires a formal signed Reproduction Release form indicating whether or not ERIC may reproduce the document. A copy of the Release Form appears as a separate page in each issue of this journal. Additional Release Forms may be copied as needed or obtained from the ERIC Facility or any ERIC Clearinghouse. Items for which releases are not granted, or other nonreproducible items, will be considered for announcement only if they are noteworthy education documents available from a clearly identified source, and only if this information accompanies the document in some form.

Items that are accepted, and for which permission to reproduce has been granted, will be made available by the ERIC Document Reproduction Service (EDRS).

Advantages of Having a Document in ERIC

Contributors of documents to ERIC can benefit in the following ways:

- ***Announcement***—Documents accepted by ERIC are announced to some 2,000 organizations receiving the abstract journal *Resources in Education (RIE).*
- ***Publicity***—Organizations that wish to sell their own documents in original copies can have this availability (together with address and price information) announced to users in *RIE,* thus serving to publicize their product. After the document is sold out at the original source, it is then still available through EDRS, if permission to reproduce has been granted to ERIC. (Original copy prices, while the supply lasts, are generally less, and are therefore more attractive to users, than EDRS on-demand duplication prices).
- ***Dissemination***—Documents accepted by ERIC are reproduced on microfiche and distributed (at no cost to the contributor) to the more than 800 current subscribers to the ERIC microfiche collection.
- ***Retrievability***—The bibliographic descriptions developed by ERIC are retrievable by the thousands of subscribers to the online database retrieval services (offered by commercial vendors such as BRS and DIALOG). In addition there are thousands of locations offering computer searches of ERIC based on either compact disk (CD-ROM) systems (offered by DIALOG, and SilverPlatter) or other local computer-based systems.
- ***Always "In Print"***—The presence of a master microfiche at EDRS, from which copies can be made on an on-demand basis, means that ERIC documents are constantly available and never go *"out of print."* Persons requesting copies from an original source can always be referred to ERIC. This archival function relieves the source of a distribution burden and solves the availability problem when the source's supply has been exhausted.

In addition, submission of a document to ERIC reduces the overall likelihood of overlap, redundancy, and duplication of effort among users. It increases the probability that the results reported in the document will be available indefinitely and used in subsequent efforts.

To encourage submission of documents to the system, ERIC offers to send contributors notice of document disposition, giving the ED identification number (for ordering purposes) of those documents selected for *RIE.* Additionally, ERIC will send a complimentary microfiche to each contributor when the document is announced in *RIE.*

There are no fees to pay in submitting documents to ERIC, nor does ERIC pay any royalties for material it accepts. Other than a statement concerning permission to reproduce, there are no forms to complete.

ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Section III: Selection

August 1991

Educational Resources Information Center (ERIC)
U.S. Department of Education

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SELECTION

Summary of Significant Rules

1. All documents selected for announcement in RIE and inclusion in the ERIC database must have a demonstrable connection with and relevance to the field of education.

2. Documents acquired anywhere in the system are transmitted, on the basis of their subject matter, to the appropriate ERIC Clearinghouse for processing. New topics, not previously included in Clearinghouse scope of interest statements, must be allocated as they arise. Scope of interest statements must be constantly revised by the Clearinghouses in order to include any new topics assumed by them or assigned to them.

3. At least one subject-matter specialist should be involved in the selection process at each Clearinghouse.

4. *Quality is the single most important selection criterion.* Quality is a composite factor made up of several more specific characteristics, e.g., contribution to knowledge, significance, relevance, newness/innovativeness, effectiveness and thoroughness of presentation, relation to current priorities, timeliness, authority of author, size of audience, balance, etc.

5. Document/publication types have been subdivided into three groups: *most suitable* (for RIE); *acceptable* (if exemplary); *unsuitable*. To be selected for RIE, documents must be one of the first two types. For example, Research Reports are "most suitable," Dissertations are "acceptable," Non-Print Materials are "unsuitable."

6. To be selected for RIE, documents must be legible and reproducible. If a document has defective pages, they must either be corrected, or judged not to seriously affect the content of the document, before that document can be selected.

7. Documents that are selected for RIE despite containing physically illegible or non-reproducible pages (or parts of pages), must bear the legend "BEST COPY AVAILABLE."

8. All documents selected for RIE must be available either from EDRS or from an outside source whose name and address can be cited. Documents that cannot be made available to users should not be selected and announced in RIE.

9. Documents about education and its many associated processes, but not designed for use in an educational context, are desirable documents for ERIC. Documents about a disciplinary or subject-matter area, but not specifically designed for educational use, must have the link to education explicitly drawn in order to be selected.

10. Document preparation activities should be engaged in whenever possible to remedy physical defects that might otherwise disqualify good documents.

11. Selection of brief materials (5 pages or less) for RIE must be reviewed and approved by the Clearinghouse Director.

12. Documents that cannot be reproduced and made available via EDRS (i.e., Level 3 documents) are permissible, but current policy is to keep their numbers relatively low, i.e., less than 10% of total input. They currently amount to around 3% of any given issue of RIE.

13. Documents produced for the public or classroom by industrial corporations, trade associations, or public utilities, must be screened to ensure that they contain valid information for practical use by educators and not just advertising, propaganda, or public relations material.

14. Selection of journal articles for CIJE is based primarily on selection of the entire journal in which the articles appear. Some journals are selected for comprehensive, cover-to-cover, handling (i.e., *all* articles are covered). Some journals are designated for selective handling (i.e., only education-related articles are covered). When selecting articles, Clearinghouses should select from the point of view of the entire system and should *not* restrict themselves to only their own scope, insofar as no other Clearinghouse will be reviewing that same journal.

III. SELECTION

A. *Introduction*

Documents acquired as candidates for possible announcement in RIE must be subjected to a set of rigorous selection criteria to determine their proper disposition. Although in many cases documents are originally acquired selectively, in most cases the decisions of acquisitions staff as to what to acquire are made in the absence of the actual document, and necessarily preliminary to the final selection process. It is the objective of this section to establish standards for judging a document in hand as to the following factors:

- Appropriateness of content/subject matter (to the field of education/scope of Clearinghouse);
- Suitability of format, medium, document type;
- Quality of content;
- Legibility and reproducibility (physical characteristics);
- Availability.

A document meeting the criteria in each of these five areas would be selected for processing and eventual announcement in RIE. A document not meeting the criteria would either be discarded or may occasionally be retained for reference or local collection use. *(NOTE: Local collections of Clearinghouse host institutions are not funded by ERIC.)*

Failure to satisfy criteria in any one of the areas may be grounds for rejection. Nevertheless, *so important to ERIC is the quality of the permanent database formed from these documents that "Quality of Content" should be regarded as the most important area.* A document may satisfy all other criteria, but if the quality is not sufficient it should be rejected. Conversely, a very high quality document may lead selection personnel to override certain problems in legibility, availability, or document type.

Throughout the selection process, the broad range of RIE's audience and the potential users of ERIC materials should be kept in mind. These varied groups encompass many levels of sophistication and represent many different viewpoints. The groups include:

- Educational practitioners;
  (teachers, trainers, therapists, etc.);
- Administrators;
  (principals, superintendents, deans, etc.);
- Policymakers;
  (legislators, community leaders, school board members, etc.);
- Program planners;
- Researchers and scholars;

- Librarians, information and media specialists
  (including television, computer, audiovisual specialists);
- Counselors;
- Parents;
- Students (at all levels)

The selection process (of Documents) is a Clearinghouse responsibility and may be performed by Clearinghouse staff, Clearinghouse Advisory Board members, or specialists from the field engaged by Clearinghouses to make evaluations and decisions. A multi-person screening committee may be used and is recommended. In any case, at least one of the screeners employed should be a subject-matter specialist. Useful recommendations on specific documents may be found in reviews and commentaries in published sources and may assist evaluators in the selection process.

Selectors should be thoroughly familiar with the ERIC database and the mandated scope of interest of the Clearinghouse involved. All selectors should, of course, maintain an on-going awareness of important developments in the particular sector of the field of education covered by their Clearinghouse. Written guidelines for use by selection personnel, and an evaluation form on which selection recommendations can be recorded, should be considered in some selection environments.

The selection of journal articles for announcement in CIJE is subject to somewhat different rules than those for documents because of the interest in covering certain journals comprehensively rather than selectively. See **Section III.H** for these details.

B. Scope of Interest (Subject Matter)

All documents selected for RIE *must* pertain in some way to the field of education (and in particular to the areas covered by the Clearinghouses). In the ERIC system, education is subdivided into sixteen major areas with a Clearinghouse in charge of each area. The areas of interest of each Clearinghouse are individually defined in the *ERIC Clearinghouse Scope of Interest Guide* (see Appendix A). The best available definition of the overall field of education for use in these selection criteria is, therefore, the combination of the Clearinghouse scope of interest statements.

1. Education as a Subject vs the Subject Matter of Education

Education and its many associated processes, such as learning, teaching/instruction, administration, research, etc., are topics that may be dealt with by documents. Examples of such directly education-related topics are school budget management, teaching mathematics, evaluation of student performance, etc. Documents dealing with such topics are of prime interest to ERIC, in both the acquisitions and selection processes.

A second type of document is not concerned with education *per se* or the educational process, but rather with its content, i.e., what is taught. Furthermore, this type deals with a topic in a way explicitly intended to be used in a formal educational setting (e.g., a chemistry class laboratory manual). Such documents are specifically designed for use by educators or students, mostly in schools, but clearly to facilitate a learning situation of some kind. Such documents are also of interest to ERIC, though there should be some effort to avoid the repetitive input of essentially the same curriculum materials in different guises.

A third type of document deals with a discipline-oriented topic, but has not been specifically designed for use in an instructional setting. Such subject-content focused materials present a selection problem. It can be argued that the point of creating documentation of any type is ultimately to use it for educational purposes, and yet *ERIC obviously cannot try to serve as a database for all knowledge or for any document that might by any stretch of the imagination be used by educators or in an educational context.* This third type of document must, therefore, necessarily be assigned a lower priority than the first two types; however, Clearinghouses may judiciously select documents closely related to their scope of interest (but not specifically tied to education) *if* the material is of demonstrable potential utility to the users. Only the highest quality subject matter documents, representing basic curriculum areas, should be selected and *only when their linkage to the field of education and their area of interest to educators can be explicitly described in the document abstract.* Selectors of this third type of document should keep in mind that a database that can accept documents on any subject is a database that cannot be characterized either by itself or by its users. Every document in ERIC must have an education-relatedness, a discernible (and describable in the abstract) relevance to the field of education.

2. *Overlapping Subject Matter*

Most documents that are education-related fall unambiguously within the scope of single Clearinghouses. When a document overlaps the scope of two or more Clearinghouses, the Clearinghouses involved should negotiate to determine which one will most appropriately process and input the material. (See Section II.) When one Clearinghouse finds itself in possession of a document that falls within the scope of another Clearinghouse, the document should be transferred promptly and directly to the appropriate Clearinghouse. For this purpose, the Facility provides the ERIC Document Transfer Form (EFF-70) (**Figure III-1**). If a document is transferred more than once, its subject may be outside ERIC's area of interest. To assist Clearinghouses in transferring documents, the "*Index*" to the *ERIC Clearinghouse Scope of Interest Guide* may be consulted.

Documents that are extremely broad or basic in their coverage (e.g., *Education in the World Today*) tend to be assigned to the broader, non-subject-oriented Clearinghouses, i.e.: Educational Management; Elementary and Early Childhood Education; Higher Education; Junior Colleges; Rural Education; Urban Education.

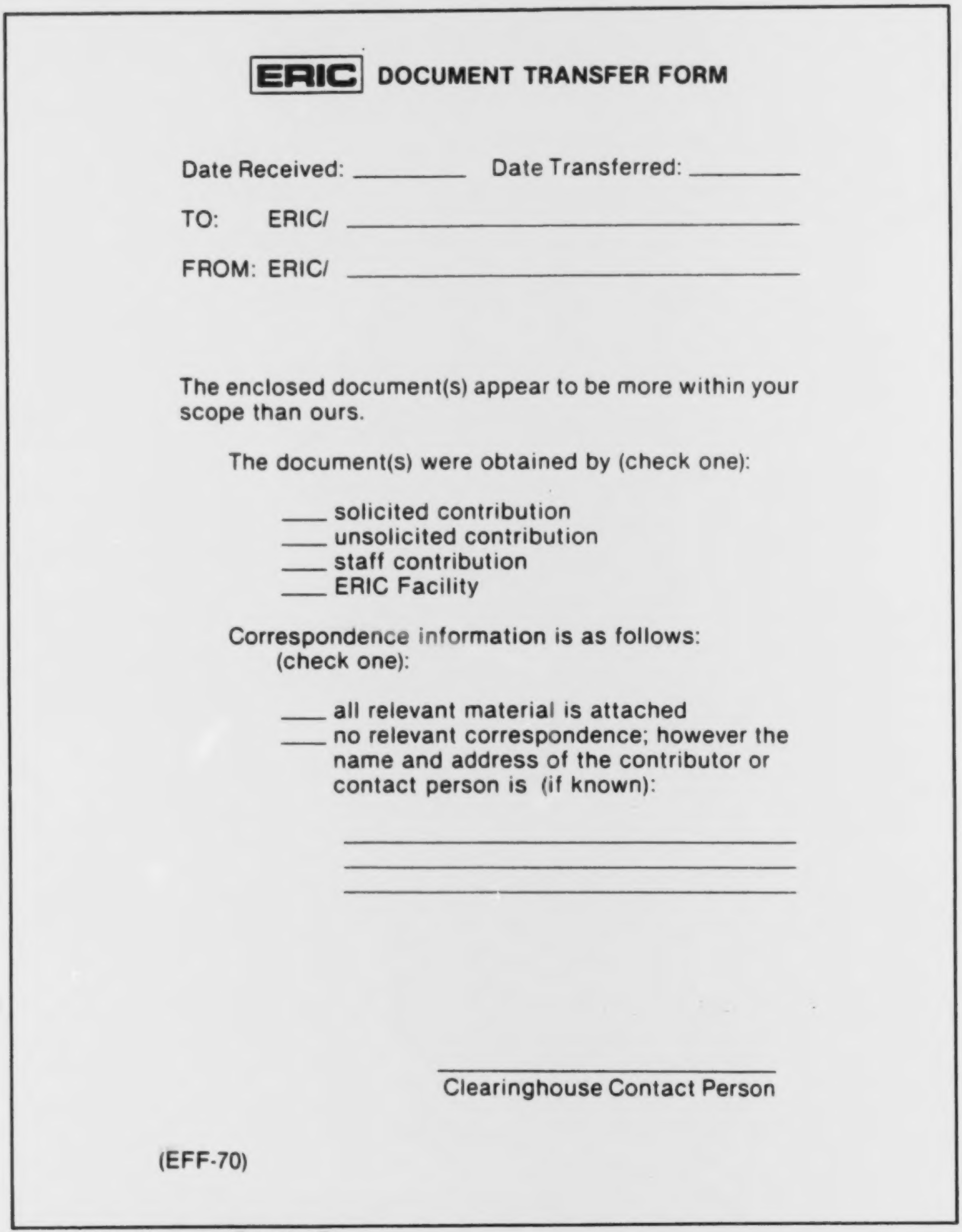
Specialized subject matter areas not specifically included in existing scope of interest statements (e.g., "*AIDS Education*") are generally assigned, via negotiation and general agreement, to the most likely Clearinghouse and the subject matter areas added to the scope of interest statement at the next revision. The intent is for the network of ERIC Clearinghouses to provide an "umbrella" encompassing the entire field of education, including new emphases, directions, and innovations, as they arise.

3. *Scope Infringement--The Importance of Staying Within Your Official, Contractually-Defined Scope of Interest*

Each Clearinghouse has an official, contractually-defined scope of interest area that has been made part of its contract. These scope statements are assembled and repeated in the internal system document entitled *ERIC Clearinghouse Scope of Interest Guide* (Appendix A), where they are indexed and elaborated on as an aid to the Facility in the assignment of documents to Clearinghouses and to help the Clearinghouses in transferring out-of-scope-documents to appropriate Clearinghouses.

It is vital and essential, for both contractual and practical reasons, that Clearinghouses operate within their defined scope areas and maintain the integrity of their respective scope of interest statements in order to avoid infringement of other Clearinghouse scope areas. *Resources in Education* (RIE) and *Current Index to Journals in Education* (CIJE) are arranged by Clearinghouse in order to facilitate browsing. Microfiche are sold by Clearinghouse prefix to customers interested in narrow segments of the literature. Online searchers are advised by all major online vendors to use the Clearinghouse prefix as a way of restricting output and increasing relevance when outputs are large.

When a Clearinghouse accessions documents outside its scope, this small but critical action begins to undermine the whole elaborate apparatus of subdividing the field by sixteen Clearinghouses. ERIC needs to support its Clearinghouse structure and to lend credibility to it, not to cast doubt upon it.



ERIC DOCUMENT TRANSFER FORM

Date Received: ________ Date Transferred: ________

TO: ERIC/ ______________________________

FROM: ERIC/ ______________________________

The enclosed document(s) appear to be more within your scope than ours.

The document(s) were obtained by (check one):

____ solicited contribution
____ unsolicited contribution
____ staff contribution
____ ERIC Facility

Correspondence information is as follows:
(check one):

____ all relevant material is attached
____ no relevant correspondence; however the name and address of the contributor or contact person is (if known):

____
____
____

____
Clearinghouse Contact Person

(EFF-70)

Figure III-1: Document Transfer Form

The ground rules are simple. To be selected by a given Clearinghouse, a document must be justifiable under the subject scope statement of that Clearinghouse. No other justification is adequate. If a document emanates from one of a Clearinghouse's acquisitions arrangements, that is not sufficient. If a document emanates from a Clearinghouse host organization, that is not sufficient. If a document is sent to the Clearinghouse by the ERIC Facility, that is not sufficient.

C. Types of Documents/Publications

To aid in selecting documents appropriate for RIE, the many different document/publication types have been subdivided into three categories: Most Suitable; Acceptable; and Unsuitable.

1. Most Suitable

- Research and Technical Reports (experimental, basic, applied)
  (*NOTE: See* **Section** III.G.8.);

- Descriptions;
  --Model Programs/Projects/Installations;
  --Innovative Practices;
  --Product Development (R&D);
  --Implementation and Dissemination Reports.

- Evaluation, Feasibility, and Study Reports;

- Surveys and Statistical Reports;

- State-of-the-Art Papers/Reviews;

- Syntheses/Interpretations/Summaries;

- Bibliographies, Discographies, Filmographies (preferably annotated)
  (*NOTE: See* **Section III.G.4**);

- Conference Proceedings and Papers;

- Congressional Hearings/Report/Documents (NOTE: Not Bills);

- Position/Opinion Papers;

- Guides (*NOTE: See* **Section III.G.7**);
  --Curriculum Guides;
  --Practical "How To" Guides;
  --Teacher Guides;

- Tests, Measurement and Evaluation Instruments;

- U.S. Department of Education and State Department of Education (SEA) Reports and Contractor Reports;

- Documents assigned "PRIORITY" status by Central ERIC (e.g. White House Conference documents).

All Clearinghouse publications and products are to be classed as "*Most Suitable*" and put into RIE, with the following *exceptions*:

- products which are published in journals
  (including offprints/reprints of these products);

- short, informal, on-demand bibliographies.

One of the major functions of the ERIC database is to make available Department of Education contractor reports and other federally-funded education-related documents which might otherwise not be available to the public. Every effort is made to collect these reports, and it is intended that they be given special consideration in the selection process. The documents of state education agencies are also of major interest and should be given special attention. (See **Section III.G.6**).

All serial publications and journal articles are generally regarded as appropriate for CIJE and not suitable for RIE (see **Section III.G.6**); however, the following exceptions are suitable:

- *journal issues*
  with a single overall *theme*, so that the issue constitutes, in effect, monographic treatment of the theme;

- *conference proceedings* (e.g. technical proceedings of annually-held meetings);

- *yearbooks;*

- *serials*
  of highly irregular publication or limited circulation, so that the issue constitutes, in effect, a unique item, not to be found in most research libraries.

Journal issues meeting the above special criteria (and the other normal subject content and quality criteria) may be entered into RIE at Level 1 or 2, *but not at Level 3*. Journal issues that are not reproducible by EDRS should never be entered in RIE, no matter what their other characteristics. Journal articles contained in journals regularly covered by CIJE should never be entered into RIE.

2. Acceptable

The following types of materials should be selected for RIE *only* when they appear to have *wide applicability* or when they are *exemplary products*:

- Annual Reports;

- Books (commercial publications);

- Brief Materials (5 pages or less) (See **Section III.G.2.**);

- Corporation-Produced Commercial Materials (see **Section III.G.3**);

- Data Collection or Survey Instruments (by themselves);

- Directories (however, frequently reissued directories are unsuitable);

- Dissertations, Theses, and Practicum Papers (see **Section III.G.1**).
- Fiscal Reports (must contain some substantive information);
- Journal/Serial "runs" of at least a year or preferably more (for archiving of serial);
- Machine-Readable Data Files (Education-Related)
- Manuals;
- Materials Produced by Local Education Agencies (LEA's) (for documents containing primarily information of a purely local or parochial nature, however, (see **Section III.G.6**)).
- Personnel Policies, Recruitment Materials, Employment Agreements;
- Speeches and Non-Conference Presentations;
- Standards and Regulations;

3. Unsuitable

The following types of documents are considered as unsuitable for RIE. The reasons for unsuitability vary. Journal articles are handled by CIJE. Non-print materials are out-of-scope for physical reasons. Flyers, brochures, and other ephemera are considered too transitory and without sufficient subject content. Bills, news releases, and interim progress reports are generally preliminary in nature and are later superseded by final documents. Any of the types of documents listed below should usually be rejected:

- Advertising and Promotional Materials;
- Announcements of funding opportunities;
- Bills (i.e., legislation in process);
- Broadsides, Posters;
- Catalogs (Commercial, curriculum);
- Directories reissued regularly (may be entered once with "generic" description);
- Drafts that will later be superseded;
- Errata, Corrigenda, Revised Pages, Supplementary Pages (acceptable only if they can be joined with document to which they apply);
- Fiscal Reports (with no substantive information);
- Flyers, Brochures, Ephemera;
- Interim or Preliminary Progress Reports (with no substantive information or that are expected to be superseded);
- Journal Articles (see **Section III.H.3**);
- News Releases;
- Newsletter Issues (see **Section III.H.7**)
- Non-Print Materials (Except for Machine-Readable Data Files)
- Proposals (in response to competition);
- Student Class Papers;
- Textbooks

D. Quality of Content

Documents selected for RIE should be of high quality, substance, and significance. The following characteristics all contribute to that elusive and subjective, but most important factor, *quality*. While every document should be examined for these desirable characteristics, not every document can be expected to manifest all features.

1. Contribution to Knowledge; Significance

Substantive contributions to educational knowledge should always be selected for RIE, especially when based on well-designed experiments or orderly collections of data. Research reports, in particular, should be examined in terms of stated objectives; hypotheses tested; and methodology, conclusions, and recommendations. In order to determine educational significance, subject experts may be consulted, if necessary.

Works by the same author, or coming out of the same program, should be examined to determine if there are any significant new developments, data, or results being reported. It should be kept in mind that negative results may be as contributory as positive results. Likewise, evidence which challenges or contradicts existing knowledge or common opinion can be as useful, or more so, as that which confirms or merely extends what is already known.

The contribution or significance of a document may also be assessed in terms of its purpose. Documents may have large and important objectives where a small amount of new information may have a disproportionately large effect. They may also have very modest objectives, attempting to place one small brick in a very large foundation or structure, the outlines of which are just beginning to emerge.

Papers prepared for learned societies or other special interest groups (e.g. professional organizations) often reflect the moving edge of new research and explorations not yet reduced to formal exposition for purposes of publication.

Documents which the selector believes add to or enhance the knowledge base of the field, or which provide an impetus for further research or action, should be selected for RIE.

2. Relevance

Relevance in this context is defined as the extent to which the document deals with issues that are current, "alive," and of contemporary interest to the educational community.

- Are emerging professional interests and topics treated, e.g., bilingual education, women's equity, metric conversion, compensatory education, etc.?;

- Does the document present work on the "frontier" knowledge area of a particular subject, e.g., environmental studies, energy science?

- Are answers offered to current social problems, e.g., parent involvement, drug abuse?

- Does the document provide basic up-to-date and comprehensive background or reference information on a subject?

- Has inclusion of the document been suggested by leadership interest or request, e.g., practitioner-oriented materials; ERIC Digests?
- Does the document deal with future trends?

3. New Applications of Knowledge; Innovative Practices

There is always a need for documents that describe the application of tested or known methods to new areas or new problems. The selector might ask the following questions:

- Does the document present an older idea, treatment, or application in a new framework or from a new point of view?
- Does the document present a new idea, treatment, or application (perhaps in relation to an older problem)?
- Does the document substantiate or contradict information contained in earlier work?
- Does the document present new hypotheses to be tested?

4. Effectiveness of Presentation; Thoroughness of Reporting

Though it may discuss a well-known subject, a document may add value because it presents the subject with exceptional clarity, vigor, or in particularly topical terms. It may present new insights, or show the subject in a new context, or in language or form particularly suited to the understanding of the *intended audience*. It is a disservice to users to select documents whose content is garbled or whose form places an unnecessary burden on the reader. Documents should be rejected if they: are poorly written; misuse the technical devices of their presentations; fail to provide sufficient information to judge or follow-up on the adequacy of their work; offer conclusions which are not supported by data.

Thoroughness of reporting refers to the extent of necessary background information provided, level of technical detail presented, and substantiation given for statements made. The following questions might be asked by a selector:

- Is the premise, thesis, or purpose stated clearly?
- Are stated goals met?
- Are the arguments developed logically and are they reasonably supported with facts and research, rather than opinion or conjecture?
- Are the procedures utilized described adequately enough to permit a later experimenter to duplicate them?
- Are data provided informatively, as in tables, graphs, etc.?
- Are key bibliographic references included? Annotations?
- Are the data evaluated (rather than just presented) or is a possible future direction to evaluation of the data outlined?

- Is the text well written, and not ambiguous, unclear, or otherwise a bar to understanding?
- How does the document compare with others on the same topic? Individualistic, or redundant and derivative?
- Does the document help to integrate the literature, e.g., by synthesizing the findings from various disciplines?
- Are addresses given for sources of materials cited?

5. Responsiveness to Current Priorities

Priorities are established by the governments and institutions responsible for the conduct of education. Priorities may be established at the national, regional, state, local, or professional level.

Documents dealing with priority issues should be given special consideration, especially those dealing with priorities, goals, and objectives established by the U.S. Department of Education. Departmental priorities identify the urgent needs in American education and the areas most requiring beneficial change and innovation.

6. Timeliness

The document should be current in terms of the work being done in the area with which it is concerned. A large number of the candidates for RIE have a value that is in inverse proportion to their age. Every Clearinghouse should, therefore, process documents as quickly as possible and should discourage backlogs.

There is no age limitation for RIE candidate documents. However, because timely, up-to-date information is to be preferred, a high percentage of RIE accessions have been published within the five years immediately prior to announcement. Some older documents, considered as "classics" or "landmarks," may be considered for RIE; however, they would be the exception rather than the rule. The same would hold for documents whose significance is the contribution they make to the historical record, e.g., the official proceedings or recommendations of a board, commission, or major organization in the field.

7. Authority of Author, Source, Sponsor

Some authors and some organizations are established leaders in their fields and have so consistently contributed to the field that virtually anything they produce *merits close attention*. Selectors must, however, not fall into the trap of automatically and uncritically accepting everything from such sources.

8. Audience; Comprehensiveness

The broader and larger the audience for a topic, the more justification there is for selecting a document on that topic. Documents on extremely narrow and specialized topics with correspondingly small audiences must, conversely, be strong with respect to the other criteria in order to warrant selection. In other words, an otherwise marginal document may be selected on the basis of the large number of people known to be interested in its topic (high user demand) whereas a marginal document with a minuscule audience is in "double jeopardy."

The large and varied RIE user group makes this a difficult criterion to apply. In addition, a stated ERIC objective is a comprehensive approach that leaves no education-related topic totally unrepresented in the database.

The selector must therefore strive to maintain a broad view, partial to no particular segment of the user group, and permitting the selection of documents potentially useful to any segment.

9. Even-Handedness and Balance on Controversial Issues

Documents and articles are, in a sense, a way of arguing for one's position. Science and the quest for truth proceed through a process of giving reports, providing evidence, and drawing conclusions. Until all the evidence is in or until the weight of the scientifically-respectable evidence comes down on one side, given issues may be controversial, with arguments being validly made for both sides.

In such situations, ERIC must take care not to take sides and to be even-handed in the selection of materials. The goal should be a balanced and fair approach which, in general, gives equal-time to both sides of the controversial issue so that users have the wherewithal to make up their own minds.

ERIC should not select materials favoring only one view, nor should it allow any organization to influence the document acquisition or selection process to favor a single view or special interest.

10. Stance on Minority, Ethnic, and Gender Concerns

Equality of educational opportunity is a national concern and a national priority. Documents that are blatantly racist or sexist in approach, argument, or recommendation, have no place in a democratic society nor in a Government-sponsored database whose very existence is intended to help achieve these principles of equality for all members of the society. Of course, racism and/or sexism as a legitimate topic of discussion or research must be distinguished from racism and/or sexism in the belief structure of the author.

11. Treatment Accorded Material With Sexual Content

Education-related documents are sometimes required to deal with sexual matters by virtue of their subject content. Examples might be: educating third world mothers concerning breast feeding; educating inner city youth concerning the threat posed by the AIDS virus; educating biology students concerning the human reproduction system; analyzing male-female relationships in a body of literature or ethnic group, etc.

These are all legitimate topics and the fact that a document may deal with sexual material in one form or another, and may have photographs, drawings, or schematics dealing with sexual material, has no bearing on its appropriateness or "selectability" for ERIC.

However, it is obviously possible for some treatments of sexual material to be offensive or even salacious (e.g., xerographic copies of sexual humor from adult magazines) and if this occurs it can be grounds for not selecting such an item for a database such as ERIC that receives such a wide distribution at all academic levels of the educational system.

Judgments in this area are notoriously subjective, and it is suggested, therefore, that questionable material of this type be reviewed not only by acquisitions staff, but also by Clearinghouse management staff.

E. *Legibility and Reproducibility*

1. General

All Level 1 and Level 2 documents announced in RIE are converted into microfiche, which are disseminated to users on both a subscription and an on-demand basis. Level 1 documents are also made available to the public in paper copy (hard copy) reproduced from the microfiche. Documents with clean, crisp, unbroken type on a clear background make the best copies. All such reproduction work is performed by the ERIC Document Reproduction Service (EDRS) using the original document collected by the Clearinghouses and forwarded to the ERIC Facility. *Therefore, in all cases, the Clearinghouse should forward the best copy of the original document.*

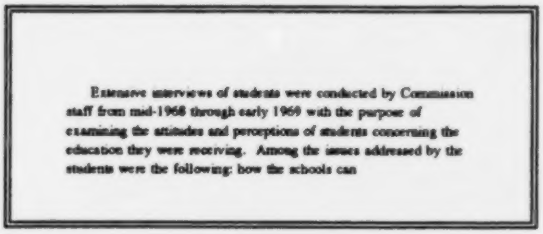
EDRS performs its work according to certain Government and national technical standards and is contractually obligated to adhere to these standards in most situations. Any exceptions must be specifically granted by Central ERIC.

The intent of this section is to describe the *physical* qualities that a document must have in order to be successfully reproduced on microfiche and then in paper copy. Since it is easier to state what can't be filmed rather than what can be filmed, the approach taken here provides criteria that will make a document illegible or non-reproducible. Documents falling into this class should be rejected. It is a disservice to inform the users of a document that they may pay to obtain and then not be able to read adequately.

2. Physical Characteristics of Documents (That Present Reproduction Problems)

a. Type Size

Type size below 6-point can generally not be reproduced satisfactorily; 6-point type is difficult to read for any length of time or amount of material, even in a good quality original. To start with smaller than 6-point, and to then produce further generations of reproduction, is to generally degrade the material to the extent that it is unsatisfactory to the user. Materials already reduced in the original document are particularly prone to falling below 6-point size and must be carefully examined.



Extensive interviews of students were conducted by Commission staff from mid-1968 through early 1969 with the purpose of examining the attitudes and perceptions of students concerning the education they were receiving. Among the issues addressed by the students were the following: how the schools can

6-Point Type

b. Type (Broken, Faint, Smudged, Dot Matrix)

Broken type is the consistent dropping of portions of the characters, e.g., the left side, the descenders, the top, etc. Keying or printing equipment out of adjustment is what generally causes broken type. While the broken type original may sometimes be readable because of faint impressions or "suggestions" on the paper, these traces are generally lost in filming, and the resultant copy can be of marginal readability to the user.

Faint or weak type can be the result of various factors ranging from an old typewriter ribbon with little ink remaining, to a poor printing job. Faint type can often be tested by attempting to photocopy the original. If there is a firm enough image to derive a readable copy on an office photocopier, then the chances are the document can be filmed adequately. If the copy is too poor, however, the document should be considered not-reproducible.

Smudged type has either had the original character images spread or dispersed around themselves, thereby confusing their nature, or it is the victim of an overprinting of other characters.

The older *dot matrix* printers produce letters where the density of dots is low and the resultant contrast with the background paper is too low to film adequately. Contributors of such documents should be required to re-print the text using a different printer. The newer dot matrix printers have a "letter quality" mode (as contrasted with the "draft" mode) that increases the dot density so that the resultant document is reproducible and therefore acceptable to ERIC.

c. Colored Papers or Inks

Colored paper or inks do not, of course, reproduce in their original color, and they do affect the quality of the black and white film image. Documents depending on color to transmit meaning (e.g., a document portraying colored spectrum lines, paint samples, textile swatches, different colored graph lines, anthropological skin color description standards, etc.) are better entered at Level 3, if possible, with the user referred to a source of availability of an original copy.

Documents printed via diazo and spirit duplicator techniques (e.g., Ozalid-blue-line process, Ditto, etc.), or in colored inks (e.g., blue, green, yellow, orange), will often not reproduce adequately. Due to spectral color response differences, sometimes a color combination that will not photograph well can be adequately reproduced on an office copier. In such an instance, the good photocopy should be substituted for the colored original.

Black ink on an especially dark paper background (e.g., dark red, dark brown, dark green, dark blue, purple, etc.), or tone-on-tone printing, is frequently unsatisfactory. Many otherwise excellent documents make use of colored paper in whole or in part. If the paper is light colored (e.g., yellow, pink, light green, tan, etc.), the item can frequently be handled at Level 1. If the paper is medium dark, but there is still good contrast between the inked characters and the paper background, Level 2 may be necessary. If the document contains significant amounts of genuinely dark paper, Level 3 should be the choice.

Material that depends on gradations of shading, such as some types of bar graphs, will not generally reproduce so that the same differentiations can be made as in the original. Text which has been "highlighted" with colored inks or shading also reproduces poorly.

d. *Translucent Paper*

Documents printed on translucent paper, such as a thin onionskin, are not a problem unless there is print on both sides and both sides tend to "bleed" (i.e., to be seen simultaneously) and thereby interfere with each other.

e. *Photographs*

Photographs will not copy well unless screened at the time of filming. Photographs that are under-exposed or very stark or simple in their content will sometimes reproduce reasonably well. Documents that depend largely or entirely on photographs to convey their message, if entered at all, are better entered at Level 3, with the user referred to a source of availability of an original copy.

If a document contains a significant number of photographs, and especially if the photographs are scattered throughout its length, rather than grouped in an Appendix, it is best to leave them in and note them in the Descriptive Note field or in the Abstract, e.g., "*Contains 25 early photographs (with detailed captions and sources) of American Indians, which will not reproduce well.*"

f. *Handwritten Documents (Holographs)*

Handwriting is more prevalent in "fugitive" educational documents than one might imagine. It rarely reproduces well because of the variability of the impression. In addition, most handwriting is highly idiosyncratic and takes on the properties of shorthand (i.e., characters are slurred, elided, or left out). Handwritten documents, or documents containing substantial handwritten material, should be avoided whenever possible.

g. *Missing Pages/Pagination Problems*

Every document selected for RIE must be checked not only to determine its correct pagination, but also to verify that there are no missing pages and that the pages that are there are in the proper sequence. Documents with pages out of sequence must be corrected before being transmitted to the Facility. Documents with missing pages should generally not be selected for RIE. An attempt should first be made to secure the missing pages and to insert them where they belong. Only if it can be demonstrated that the missing pages are not essential may the document be selected for RIE; in such cases, the missing pages must be noted in the Descriptive Note field, and the document must be stamped on the cover "BEST COPY AVAILABLE."

h. Blank Pages

Completely blank pages contained in a document should not be filmed, even if they bear a page number in the original. The paginator's consecutive number stamp will provide one clue to the user that a page of the original was skipped deliberately. It would also be helpful (though not mandatory) if, in document preparation, a page following a blank page could be marked with the notice: "*The previous numbered page in the original document is blank.*"

Occasionally a page will contain so little information (e.g., "Appendix A") that a document preparer is tempted to treat it as a blank page. This may be done, at the judgment of the document preparer, if the sparse information is repeated on the following page; however, as a general rule, it is best to convey to the user the entire original document as it was created, improving legibility where possible, and forewarning the user with appropriate cataloging notes, but *not* editing out any entire pages.

i. Undersize Pages (Within Regular Size Documents)

Undersize pages, e.g., 3" x 5"; 4" x 6"; 6" x 9", are not a filming problem as long as the text they contain is clear, legible, and no smaller than 6-point.

j. Oversize Pages (Within Regular Size Documents)

The ideal page size is 8-1/2" x 11", standard letter size. Any page exceeding these dimensions is considered "oversize" and must be handled by one of four possible techniques:

- document preparation
  re-arranging, trimming, cutting and pasting, re-typing, etc., in order to create one or more regular size pages from the oversize original
- increased reduction ratio (up to 29X)
  can be used to get legal size (8-l/1 " x 14" pages) into one frame. However, the entire document is then generally filmed at this ratio.
- double-framing
  wide pages, up to 17" x 11", can be filmed right-reading across two microfiche frames
- overlapping images
  foldouts (or oversize documents) which exceed the limits that can be handled by the double-framing and increased reduction ratio techniques, must be handled as a series of overlapping images; however, this technique is awkward for the user and reduces the utility of the document.

Detailed instructions concerning each of these techniques appear in this *Manual* in **Section V**. Oversize pages can be handled satisfactorily. Only the overlapping image technique creates some potential confusion to the user on the resultant microfiche.

3. Document Preparation (Remedial Actions for Physical Document Problems)

The mere presence in the document of one of the above undesirable physical characteristics is not sufficient to prevent selection. The physical problem must exist to an extent that materially affects the document. There are three possibilities:

a. The physical problem affects the document only slightly and need not be corrected.

In this case, the document may be selected for RIE. The problem may be noted in the Descriptive Note, if desired, but this is not required except in the case of missing material. Examples of this type of problem might be: small type interspersed internally on a few pages or tables; a few photographs; a few pages with broken or otherwise poor type; a missing and unobtainable, but non-essential section or appendix (should be noted in the Descriptive Note).

b. The physical problem has a substantial effect on the document, but it can be corrected by the Clearinghouse itself.

In this case, the document should have the defect corrected if it is selected for RIE. (Major amounts of re-typing should be avoided, however.) Examples might be: illegible pages that can be re-typed; a graph dependent on color that can be re-labeled so as to be independent of color; material in excessively small type that can be photocopied or re-typed; out-of-sequence material that can be re-sequenced.

c. The physical problem has a substantial effect on the document and requires going back to the source for remedial action.

In this case, the Clearinghouse should work with the source to correct the defect, if possible. Examples might be: extensive missing pages; extensive materials reduced below 6-point size; and extensive illegible pages.

In some cases, sources have been willing to make available the original camera-ready copy in order to see that their document makes it into the ERIC system.

As a general rule, a document that has substantial physical defects should not be selected "as is" for RIE. Rare exceptions may occasionally be made in the case of unusually important and high quality documents that simply cannot be corrected, e.g.: the author is deceased; the source organization no longer exists; no other copies exist, etc.

Whatever the reason, if a physically defective document is selected for RIE, the document cover must be stamped "BEST COPY AVAILABLE" and should be entered at Level 2 (microfiche only). If the defect is serious, it should be noted in the Descriptive Note. If it is not appropriate to describe the defect specifically, the following general type of note should be placed in the Descriptive Note field: "*Not available in paper copy due to marginal legibility of original document.*

PRIORITY documents transmitted from the Facility have generally been screened in advance for legibility and reproducibility before being sent to the Clearinghouses. If such a document bears the stamp "BEST COPY AVAILABLE," the possible sources of better copies have already been exhausted.

F. Availability

Documents announced in RIE must be available either through EDRS (Level 1 or 2) or through an outside source whose name and address can be cited in the Availability field (Level 3). ERIC's policy is not to announce documents that the user cannot obtain in some way. Therefore, if a document cannot be reproduced and a source of availability cannot be found, it should not be selected for RIE.

The degree to which a document is readily available from sources other than ERIC can also affect the selection decision. ERIC recognizes a certain responsibility for the bibliographic control of fugitive materials in the field of education. If a document would probably not be available anywhere if not included in the ERIC database, then there are stronger reasons for selecting it than there would be if it were available through regular publishing channels.

Documents which are commonly and easily available on a nationwide basis should generally be evaluated by selectors very strictly. It is unlikely that the use of such documents by the educational community depends on ERIC. They will be in many library collections and will therefore be frequently cited and readily consultable by users quite apart from any announcement in RIE. Unpublished papers and those having only local or specialized distribution should, on the other hand, be evaluated more leniently. ERIC may be the only database that has acquired the document and the only one in a position to preserve the document for future users.

G. Factors To Be Considered in Selecting Certain Types of Documents

The preceding criteria pertaining to quality, reproducibility, and availability, apply equally across all documents being considered. Beyond these common selection criteria, however, there are some "considerations" that apply only to specific types of documents.

In this section, eight types of documents have been isolated from the "*Most Suitable*" or "*Acceptable*" categories, and a discussion of each type is provided that takes into account the special characteristics of that type and how they might affect selection decisions.

1. Dissertations and Theses

Acquisition of doctoral dissertations and masters theses on a *systematic* basis is not expected of the Clearinghouses, but such items are acceptable when they meet special criteria.

The majority of domestic doctoral dissertations are controlled by and announced in University Microfilms International's (UMI) *Dissertation Abstracts*. It is possible, therefore, to be very selective about dissertations that are candidates for RIE. In addition to the normal selection criteria, the following situations may be justification for including a dissertation in RIE:

- The university granting the degree does not participate in *Dissertation Abstracts*, e.g., University of Chicago. (In the front of each issue of *Dissertation Abstracts* is a list of currently participating institutions.)

- The dissertation is of special importance to the area of education covered by the Clearinghouse and by its high quality would definitely enhance the ERIC database.

Particularly significant dissertations that are in (or going in) *Dissertation Abstracts*, and that are also selected for Level 3 announcement in RIE, should provide UMI ordering information in the Availability field.

Dissertations that are *not* in (and not going in) *Dissertation Abstracts*, and that are selected for RIE, should be entered at the level granted by the author. If a dissertation, which is selected for RIE, gives a source of availability, but the author cannot be reached for a release, then the document may be announced at Level 3.

Masters theses are controlled and announced, on a more limited basis, via UMI's *Masters Abstracts*. Masters theses (and research papers from fifth-year programs) may on an exception basis be entered in RIE at Level 1 or 2; they must, however, be entered at Level 3 when announced in *Masters Abstracts* and when available from UMI.

NOTE: An alternative way of announcing dissertations has been adopted by one Clearinghouse. The Clearinghouse prepares bibliographies of dissertations focused on specific topics. Each bibliography contains citations for approximately 18 to 24 dissertations announced in *Dissertation Abstracts* during six-month time periods (January-June and July-December), and, with the permission of UMI, includes the full DA abstract and ordering information. The bibliography is then entered into ERIC at Level 1.

2. Brief Materials (5 pages or less)

Brief materials consist of those documents of five or fewer pages, with the text containing 1,500 words or less.

Short documents can create user problems, and their entry into RIE should be kept to a minimum. Users may object (and have in the past) to paying full microfiche or paper copy prices for short documents when the documents do not contain much meaningful information. For these reasons, short documents selected for the ERIC system must be scrutinized with greater than ordinary care. They *must* be documents of high quality.

Although the considerations listed below are similar to selection criteria mentioned elsewhere, they are very important to emphasize in the selection of short documents.

- Synthesis of high quality information presented in a concise manner;
- Timeliness, uniqueness, and significance;
- Utility for users;
- Loss to the education field if not included in ERIC.

The following types of documents, which are sometimes brief in length, are usually acceptable if they meet the selection criteria above:

- Speeches;
- Tests, Questionnaires, or Evaluation Instruments;
- Numerical/Quantitative Data Compilations;
- Descriptions of Promising Practices.

The following types of documents, if in brief form, are in general *not* acceptable:

- Bibliographies;
- Opinion Papers

NOTE: Central ERIC requires that all documents 5 pages or less in length be reviewed by the Clearinghouse Director and, if selected, bear an indication on the log form to show that it has been reviewed and approved by the Clearinghouse management.

3. Corporation-Produced Materials

"*Corporate Materials*" refers here to classroom materials produced by commercial industry (e.g., Kodak, McDonald's, Kellogg, General Motors, J.C. Penney, etc.), trade associations, and public utilities. Corporate materials are generally inexpensive or even free. Environment, energy, and nutrition are common topics. Most materials treat the company's area of business. For example, Kellogg publishes materials with food-related information; General Motors publishes materials about the automobile; the utility companies write about energy issues, etc.

Corporate materials can be helpful classroom resources if they are appropriate and *not unduly biased*. The production of classroom materials by industry, trade associations, and public utilities causes some concern that companies may be taking advantage of students as a captive audience in the classroom. There is a common belief that schools should be free from commercial exploitation. Therefore, such documents need to be carefully scrutinized to see that they contain valid information for classroom use and not just corporate advertising, propaganda, or public relations material.

The following considerations should be weighed in the selection of such materials:

- Validity
  Avoidance of propaganda, of subtle biases toward the company or industry, and of telling just part of the truth when dealing with controversial issues.

- Accompanying Instructions
  Provision of adequate information and instructions to facilitate use in the classroom or other educational settings.

- "Generalizability"
  Generalizability of materials to other localities, states, and settings (for example, the materials should not be training materials designed specifically for one unique, small group or geographic setting, and not capable of replication.)

Selected corporate materials should, as a rule, be put into ERIC at Level 1 or 2. Many corporate materials may consist of non-print media components such as posters, brochures, or films, which are not appropriate to the ERIC system. If these components are essential to the meaning or usefulness of the materials, the materials should *not* be selected. Since the materials are generally designed to be eye-catching and attractive, there may be special problems relating to reproducibility, such as color, size, etc. Corporate materials should meet all regular reproducibility guidelines.

4. Bibliographies

Bibliographies consist of lists of materials relating to a particular subject, author, or period. Bibliographies may cite books, films, and multimedia materials. They may or may not contain annotations or abstracts.

Bibliographies can be extremely useful to the user of ERIC when they are specific to a topic, contain sufficient information to enable a user to locate entries relevant to her/his needs, and provide complete bibliographic information.

The following list is intended to assist in the selection of bibliographies. Considerations under each of the major headings below are suggestive, not prescriptive, i.e., these are merely factors to think about in the selection process, as an item is compared to others like itself in order to judge the best quality materials:

- *Purpose and Scope*
  - -- Identification of purpose
  - -- Indication of intent (exhaustive or selective, including basis of selection);
  - -- Statement of limitation (language, geographic boundaries, periods of time, or subject);
  - -- Creation of more than a mere list of titles.

- *Organization and Arrangement*
  - -- Inclusion of a Preface, Table of Contents, and Index;
  - -- Compilation in accordance with the stated purpose;
  - -- Explanation of special features;
  - -- Provision of clear, concise, and informative annotations or abstracts;
  - -- Usefulness, consistency, and suitability of the arrangement (alphabetical, classified, chronological, geographical, or a combination of one or more methods)

5. Level 3 Document (Documents That Cannot Be Reproduced)

Level 1 documents are available from EDRS in both paper copy and microfiche. Level 2 documents are available in microfiche only. Level 3 documents are not available from EDRS, but *are* available from an external source (cited in the Availability field).

Although every effort should be made to obtain reproduction releases, there remain some documents for which releases cannot be obtained. Commercial publishers and other organizations (such as Unesco and the Council of Europe) may sometimes refuse to let ERIC reproduce their documents. In addition, some documents may not reproduce adequately in either microfiche or paper copy because of charts, photographs, colored pages and inks, or other physical characteristics.

Documents that cannot be microfiched and made available via EDRS have always been allowed into the ERIC system, but always at a low percentage rate. The reason for this restriction is that Level 3 documents can frustrate the user who is accustomed to finding RIE announcements in the ERIC microfiche collection. In addition, orders are often placed by librarians with EDRS without checking Level status; orders for Level 3's are, of course, returned unfilled. As a result, Level 3 documents are permitted by ERIC sparingly (if they have a reliable source of availability that can be cited), but are not encouraged. Clearinghouses vary in their Level 3 input, but the overall system percentage is currently approximately 3% annually and should not exceed 10% overall.

Because the volume of Level 3 documents is restricted, they must be subjected to more stringent selection criteria than regular documents. The following considerations might apply:

- Contains new information or information that can fill a known gap in the database;
- Provides detailed information on a subject not previously treated in depth, or provides a synthesis/overview of a topic for which the literature was previously scattered;
- Provides timely and current information, or information for which there is an active current demand;
- Provides exceptional, exemplary information of a level significantly higher in quality than other input;
- Provides information of special importance in the field or of historical significance ("landmark" or "classic" documents);
- Prepared or published by an authoritative source and, therefore, is apt to receive significant attention and user interest.

In general, *documents that are available only from sources outside the United States* should not be considered for Level 3. Exceptions may be made for highly significant foreign documents available from sources of known reliability (e.g., Unesco, OECD, IBE). (See **Section II.E.9** for the stringent selection criteria to be used for such documents.)

The following kinds of documents will occasionally require Level 3 processing:

- Books;
- Collected Works;
- Commercial Guides;
- Creative Works;
- Directories;
- Dissertations;
- Historical Materials;
- Maps;
- Non-Print Media (will *always* require Level 3 processing);
- Reference Materials.

In citing the external source of availability, it is necessary to include the full address and advisable to include the price, for the convenience of the user. If there is any question of availability, the source should be checked. Documents soon to go out of print, or for which stocks are depleted or do not exist, should not be selected.

6. Documents Containing Material of Local/Parochial Interest

"Local" refers here to a limited geographic area. "Parochial" refers here to a narrow subject matter and correspondingly limited audience.

Documents containing substantial amounts of information of a local or parochial nature may come from any source, but are often produced by local education agencies.

Although ERIC serves many specialized audiences, most ERIC documents should be of interest to a fairly broad audience. Documents containing a substantial amount of local and parochial content are generally *not* desirable candidates for RIE and should be selected *only* if they also have some significance and utilization beyond the narrower confines, or are generalizable to other content areas.

Documents which occasionally fall into the local/parochial category are:

- Directories of Local Services;
- Historical Materials;
- Holdings Lists of Local Libraries;
- Legal Materials;
- Surveys.

Bibliographies may also verge on this category by focusing heavily on local references, often difficult if not impossible to obtain outside the local area.

The following considerations should be kept in mind when evaluating documents containing local/parochial material:

- *Usefulness at a Broader Level*

  For example, the document could provide a model useful to educators in other districts developing similar programs. It could report a survey done at the local/state level, but generalizable to other areas. If a document is only about local issues, it should not be selected, but if the local issues are related to broader national issues, or if other locales are facing similar issues, it may be selected.

- *Coverage of a Unique Subject Not Available in Other ERIC Documents*

  For example, a document could offer historical information or survey information about an area which teachers elsewhere may use as resource material.

- *Includes Information That Can Serve as a Base to Answer Common Requests*

  For example, many teachers are interested in finding curriculum guides for the particular area/state in which they teach, or guides from other areas that they can adapt.

7. Instructional Materials (for Student or Teacher)

Designed for practical use by either student or teacher, these materials often have a component which includes instructions and/or activities. Materials falling into this category are:

- Classroom Materials;
- Curriculum Guides;
- Instructional Packages;
- Lesson Plans;
- Teacher Guides and Resources;
- Student Guides and Resources;
- Units of Study.

Teacher guides and resources include materials which can be used by the teacher for obtaining background knowledge, factual knowledge, awareness-raising, or "how-to" information. They often provide conceptual frameworks for teaching and specific strategies and activities for classroom use. Student resources are materials that students can use essentially without direction or intervention by the teacher.

Many of ERIC's users are practitioners who request materials to help them in their teaching. *A major aim of the ERIC system is to provide a database that includes sound student and teacher guides and resources.*

The following list of factors is intended to assist in selection of student and teacher materials. The list is suggestive, not prescriptive. Good materials will encompass many of the factors; average materials will encompass a few; poor materials will exhibit none. An appraisal of these factors can contribute to making a better decision about whether to include the materials. As always, selectors must use a holistic approach to document selection, taking account of both the ERIC guidelines and their own experience and expertise within their Clearinghouse scope.

It is *extremely important* that instructional materials be examined to avoid duplication of their information content. One state may publish an instructional manual consisting primarily of content derived from another state. It is, therefore, essential that the selector be a senior staff person who is knowledgeable about the scope of the Clearinghouse and the content of the existing database.

- *Organization*
  - -- Ease of use;
  - -- Presence of a Table of Contents, Preface, Glossary, Index.
- *Educational Objectives*
  - -- Clarity of instructional goals, including both affective and cognitive objectives, whenever appropriate.
- *Content*
  - -- Accurate and valid presentation of information;
  - -- Complete information included without major omissions;
  - -- Inclusion of sound and substantive information;
  - -- Logical development of ideas;
  - -- Up-to-date data and illustrations.
- *Teaching Strategies*
  - -- Appropriate for target group;
  - -- Clarity of methodology;
  - -- Explicit identification of concepts;
  - -- Reflection of a variety of teaching/learning modes.
- *Activities*
  - -- Logical relationship among basic objectives and activities;
  - -- Appropriateness and relevance of a variety of activities to pupils' experiences, interests, levels of comprehension, and grade level.
- *Stereotyping, Bias, and Social Inequity*
  (selection should be sensitive to extremes)
  - -- Whenever possible, avoidance of statements of bias and stereotyping concerning women and ethnic groups;
  - -- Promotion of mutual understanding and respect between races and ethnic groups;
  - -- Fair treatment of people as individuals.
- *Suitability of Materials for Learners*
  - -- Relationship of content to pupils' experiences, interest levels, levels of comprehension, age and maturation level;
  - -- Suitability of vocabulary, sentence and paragraph structure, and concept level to the age group that will use the materials.

- *Completeness of Bibliographic References*
  - -- Usefulness of information included in the bibliographic citations so that the user can obtain resource materials;
  - -- Indication of grade level, if needed.
- *Completeness*
  - -- Self-contained independent materials.
- *Duplication of Materials Already in the ERIC Database*
  - -- Uniqueness relative to other materials already in ERIC, i.e., inclusion of new techniques or information on a needed or unique topic.

8. Research Reports

Good, in his *(Dictionary of Education)*, defines research as:

"...disciplined inquiry, varying in technique and method according to the nature and conditions of the problem identified, directed toward the clarification or resolution (or both) of a problem.

(Webster's Collegiate Dictionary) defines research as:

"...investigation or experimentation aimed at the discovery and interpretation of acts, revision of accepted theories or laws in the light of new facts, or practical application of such new or revised theories or laws."

Reprinted in **Figure III-2** are the characteristics of a good research report as conceived by the National Council of Teachers of Mathematics (*Criteria for Judging Research Reports and Proposals* - ED 138 469). Consideration of these factors may facilitate the selection of high quality research reports.

9. Student-Written Materials (for Other Students)

The use in classrooms of student-written materials in order to help teach other students is an instructional approach that periodically finds favor with teachers.

Such materials are too voluminous to consider acquiring comprehensively. However, examples of the approach may be selected for ERIC, at the discretion of the inputting Clearinghouse. In such cases, it is probably best to group a number of such student-written examples into one document, clearly indicating what they are and what school and the class from which they came.

a. The Problem
  (1) The problem is clearly stated, and the rationale is logical.
    (a) The purpose is concisely stated.
    (b) Objectives are specified.
    (c) Procedures are specified.
    (d) Variables are identified, and their relationship to theory or observation is explained (if the variables are new, then evidence from a pilot study is presented).
    (e) Research hypotheses are concise.
    (f) Research hypotheses are logically developed from some theory or related problem, and they are clearly plausible.

  (2) The problem is significant.
    (a) Its relationship to previous research has been well established.
    (b) The hypothesized research findings should be generalized beyond the sample.
    (c) The study will make a contribution to the advancement of knowledge.
    (d) The results will contribute to the solution of some practical or theoretical problem.

b. Design and Procedures
  (1) The design of the study is appropriate to the solution of the problem.
    (a) The research design is fully developed.
    (b) Assumptions are clearly stated.
    (c) Limitations are noted.
    (d) The population and sample are described:
      - geographic limits;
      - time period covered;
      - sociological description;
      - sampling units.
    (e) The sampling method is appropriate and practical.
    (f) Controls for sources of error are described and are appropriate: sampling error; nonresponse; interviewer bias; response error; response set; experimenter bias; teacher effect; control of variables; extraneous factors.

  (2) The relationship of the procedures to the implementation of the design is appropriate.
    (a) The data-gathering methods are clearly described and meet the requirements of the problem.
    (b) The obtained sample is of a sufficient size and is representative of the defined population.
    (c) The measuring instruments are appropriate.
    (d) The validity and reliability of the evidence are established, or a procedure for establishing the validity and reliability of the evidence is described.

c. Analysis and Conclusions
  (1) The analysis of the data is appropriate.
    (a) The results of the analysis are clearly represented.
    (b) The analysis methods are valid, appropriate, and properly applied.
    (c) The assumptions behind the statistical tests are stated, and the relationship of the test to the design is appropriate.

  (2) The conclusions are reasonable.
    (a) The conclusions are clearly stated.
    (b) The conclusions are substantiated by the evidence presented.
    (c) Interpretations and implications are impartial and scientific.
    (d) A comprehensive discussion of the qualifications is given (methodological problems and errors, alternative explanations, other limitations).

  (3) The research is adequately reported.
    (a) The report is logically organized and clearly written.
    (b) Grammar and mechanics are adequate.

Figure III-2: Characteristics of a Good Research Report (From ED-138 469)

10. Department of Education Documents

U.S. Department of Education publications (including those of OERI and NCES) should, as a rule, be selected for the ERIC database. Such selection is not mandatory and there may be exceptions, on the basis of either quality or reproducibility, but the rejection of an ED/OERI publication requires a solid rationale and justification.

If, for any reason, a Clearinghouse does not want to accession an ED/OERI document, it must be returned to the ERIC Facility together with a completed "ED/OERI Document Selection Report" form (i.e., your rejection justification (See **Figure III**).

When Department of Education documents are published, press releases or press packets are often issued simultaneously, thereby creating an immediate public demand and making it important that these documents be made available by ERIC as quickly as possible. If selected for ERIC, Department of Education documents should "go to the head of the line" and be the next documents processed by the Clearinghouse. It is often a good idea to include as an appended part of the document the associated press releases and press kits/packets, insofar as they contain useful highlighting and other additional information.

NOTE: ERIC Digests fall within this category and all ERIC Digests should routinely be processed for RIE announcement.

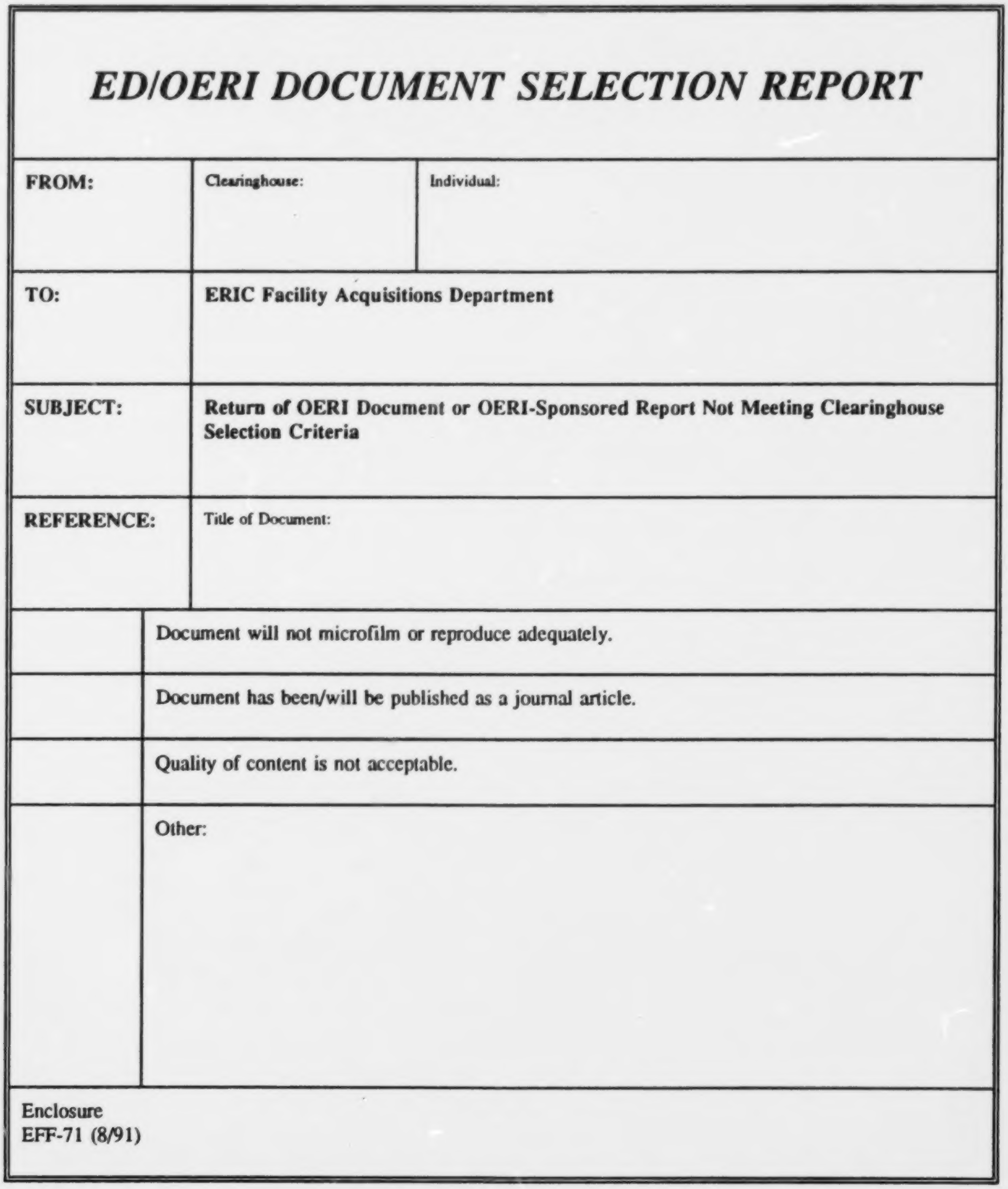
H. Journal/Serial Selection Issues

1. Introduction

The *Current Index to Journals In Education* (CIJE) is a monthly index journal designed to announce and disseminate education-related information contained in the current periodical literature. CIJE is a companion journal to *Resources in Education* (RIE); between them they cover a large percentage of the total literature of the field. Over 700 journals are covered regularly by the ERIC Clearinghouses and are listed monthly in the "*Source Journal Index*" (appearing in each issue of CIJE). Journal articles processed by the ERIC system are processed for announcement in CIJE. The few exceptions are discussed in **Section III.C.1.**

2. Selection of Journals

The selection process for CIJE exercises its quality control primarily at the journal level. High quality education journals are pre-selected to be covered totally or comprehensively. All others are pre-selected to be covered selectively (but comprehensively for their education content). In general, therefore, the application of qualitative criteria is not as relevant in selecting individual journal articles for announcement in CIJE as it is in selecting individual documents for RIE. This is because CIJE was designed to cover *all* education-related articles in the journals that it formally states it will cover. It is useful to educators, and essential for librarians among others, to know and to be able to count on, for example, the fact that *all* articles appearing in a core education journal such as the *Harvard Educational Review* and *all* education-related articles appearing in important general periodical such as *Science*, will, without exception, be announced in CIJE.



ED/OERI DOCUMENT SELECTION REPORT

FROM:	Clearinghouse:	Individual:
TO:	**ERIC Facility Acquisitions Department**	
SUBJECT:	**Return of OERI Document or OERI-Sponsored Report Not Meeting Clearinghouse Selection Criteria**	
REFERENCE:	Title of Document:	
	Document will not microfilm or reproduce adequately.	
	Document has been/will be published as a journal article.	
	Quality of content is not acceptable.	
	Other:	

Enclosure
EFF-71 (8/91)

Figure III: ED/OERI Document Selection Report (EFF-71)

Journals from which articles are derived for announcement in CIJE can be thought of as of three types.

- *Education Core Journals*
  Journals totally concerned with the field of education.
  Example: *Journal of Educational Research*

- *Education-Related Journals*
  Journals that regularly and frequently contain articles bearing on education, but whose main focus is elsewhere:
  Example: *Journal of Applied Psychology*

- *Non-Education Journals*
  Journals that occasionally, but infrequently, contain an education-related article.
  Example: *Science*

3. *Selection of Articles Within Journals*

The selection of individual articles within formally covered journals listed in the "*Source Journal Index*" is guided by the following rules:

- Coverage of designated core education journals must be "cover-to-cover." This is defined as comprehensive and complete article coverage, normally excluding, however, such miscellaneous items as book reviews, editorials, letters to the editor, newsletters, feature columns, schedules of events, advertising, articles of one page or less, etc.

- Articles in education-related journals are selected for inclusion in CIJE strictly on the basis of their relationship to the field of education. Articles not related to education are excluded, as are the miscellaneous type of material referred to above.

In addition to its regular journal article workload, derived from journals formally covered by CIJE, it is permissible for a Clearinghouse to input *any* good quality education-related article that may be detected in some other journal not regularly covered, e.g., *The New Yorker*. These are called colloquially, "*oneshot*" articles. It is not necessary to receive prior approval for "oneshots," but they should be identified as such by writing " oneshot" on both the top of the resume form and in the "Comments" block on the log sheet. It should be remembered, however, that the journal involved will *not* be listed in CIJE among those formally covered. In order to provide the user with means to obtain a copy of the article, if desired, it is recommended that the address of any small, obscure, or otherwise difficult to identify journal, be cited in the cataloging. This "oneshot" category is intended to be used on an *exception basis*, (i.e., no more than one or two per month), for the occasional important article from a non-education journal. Any journal that is repeatedly a source of "oneshot" articles, should be considered for possible regular formal coverage.

"Oneshot" articles present a special duplicate checking problem in that a Clearinghouse has no way of knowing whether any other Clearinghouse has "discovered" the same article. All that can be done is to check to be sure that the journal is not one that might fall within the subject scope of another Clearinghouse. If that is a possibility, check with the other Clearinghouse to be sure that they are not accessioning any articles from the same "oneshot" journal issue.

4. *Procedures for Recommending New Journals to be Considered as Candidates for CIJE*

Clearinghouses nominate appropriate journals for inclusion in the "*Source Journal Index*." New journals should be nominated by the Clearinghouse responsible for the subject area concerned for either cover-to-cover or selective processing. Central ERIC approves or disapproves these nominations along with the CIJE Publisher, on the basis of the overall size of the list.

If non-Clearinghouse components (e.g., Central ERIC, EDRS, ERIC Facility, Oryx Press, ACCESS ERIC) learn of new candidate journals, they should transmit the information to the appropriate Clearinghouse. If the original recipient cannot determine the appropriate Clearinghouse, the materials should be sent to the ERIC Facility's Acquisitions Department for this decision.

Given the large number of journals covered by CIJE, Clearinghouses should generally attempt to delete a marginal journal (e.g., less valuable content or irregular publication schedule) in order to add a significant new journal. The responsibility for making this decision belongs to the individual Clearinghouse. If, however, it becomes necessary in the opinion of the Clearinghouse to add one or more journals and not to delete any, justification should be submitted to Central ERIC which, in consultation with the CIJE Publisher, will make a decision in the matter.

For all approved journals, the selecting Clearinghouse should forward to the CIJE Publisher the journal name, publisher name and address, frequency, subscription price, and ISSN number, for inclusion in the next "Source Journal Index."

5. *Journal Article Legibility and Availability*

Journal articles are not handled by the ERIC Document Reproduction Service (EDRS) and are therefore not reproduced by EDRS for users in either microfiche or paper copy. The articles announced in CIJE are available through the original journals themselves and through reprint services such as UMI and ISI. For these reasons, questions of legibility, color, page size, type point size, and reproducibility do not enter into either the selection process or the later cataloging process and need not be considered by the Clearinghouses.

6. *Using RIE as an Archive to Store Journal "Runs"*

The full text of documents announced in RIE are stored on microfiche and are thereby "archived" for future researchers. Once an item has been announced in RIE, a user knows that it is going to be available, that it is permanently "in-print."

This special capability of ERIC can sometimes be used to advantage in order to archive lengthy runs of serials that are obscure, not widely held by libraries, and not available via the journal article reprint services, such as UMI.

In other words, if a Clearinghouse is covering a given journal for CIJE, but that journal is not available via UMI, the Clearinghouse might well want to consider "backing up" their CIJE accessions by entering the entire journal, as a run, in RIE. They could then point the user to the RIE microfiche for the item for availability purposes.

This approach presupposes that the Clearinghouse can obtain reproduction permission for the journal/serial in question.

Such a "run" must consist of at least a year's worth of the journal, but when taking this approach, it is advantageous to the user for the RIE accession to consist of as long a run of the journal as possible. In this way, the user can go to a single location for the bulk of the journal and need not consult multiple accession numbers.

7. *Newsletters*

Newsletters are usually the house organ of some organization and are intended as a rapid, easily- and quickly-produced way to keep in contact with the membership or constituency of the organization. Newsletters are numerous, frequently issued, typically containing extremely brief materials, replete with transient news and notices.

Newsletters are serials, but usually without substantive articles that can be extracted. They are troublesome for a conscientious database such as ERIC in that they are clearly useful to their recipients, but are problematical to process into a system oriented toward monographic material or extensive substantive articles on unitary subjects.

In general, newsletters are *not* acceptable material for either CIJE or RIE, and individual issues should *not* be selected for the ERIC database. If allowed in, in their multitudes, such issues would clog the system with transient, ephemeral, look-alike accessions that would, over time, cause retrieval problems. ERIC would not be doing the users a favor by burying their search outputs in such material. For reasons such as these, virtually no other major bibliographic database accessions newsletter issues.

ERIC can afford to make the following exceptions:

SITUATION	SOLUTION
Newsletter contains lengthy, substantive article, comparable to regular article in professional journals	(1) enter as one-shot article in CIJE OR (2) if newsletter too obscure and not likely to be in libraries, and if reproduction release obtainable, analyze article alone (not the whole newsletter issue) in RIE, as if it were a monograph. The name of the article is the title of the accession.
Newsletter issue is devoted to single unified theme and that issue theme can be distinguished from the general subject matter always covered by the serial.	Enter in RIE as single accession, with issue theme title used as the title of the accession.
Newsletter judged to be highly useful in its entirety, not readily available, and reproduction release obtainable.	Archive newsletter in RIE (and on the ERIC microfiche) by entering as long a run as can be assembled as a single accession. Must be at least a year's worth, and preferably more. The name of the journal is the title of the accession.

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Section IV: Handling and Shipping

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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U.S. Department of Education

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Summary of Significant Rules

1. There are three classes of document handling: (1) ROUTINE; (2) Department of Education Documents; and (3) PRIORITY. Department of Education documents must be the *next* documents processed routinely. PRIORITY documents must be processed on an expedited basis, in time to be included in the next available issue of RIE. Department of Education documents and PRIORITY documents are given special identifying cover sheets. PRIORITY documents may not be rejected.

2. As soon as possible after documents are selected for the database, basic title information is to be transmitted to the ERIC Facility for updating the *Acquisitions Data Report* (ADR), the system-wide duplicate checking file. These transmissions may take place daily, or at any convenient frequency. The sooner a title is entered, however, the sooner a "claim" is staked for that document.

3. The basic responsibility for duplicate checking resides with the Clearinghouses. "Duplicates" are defined as two or more copies of *exactly* the same document. (Variations of a text, published at different times, are not considered duplicates, though their close similarity may be a factor in selection.) Prior to publication of RIE, the Facility makes a final duplicate check of all items received from Clearinghouses.

4. Official Project Officer clearance for OERI/ED-prepared or sponsored documents is *not* required. Such documents received from the ERIC Facility or other sources can be assumed to have been cleared.

5. Clearinghouses are responsible for obtaining Reproduction Releases for documents from the appropriate personal authors, corporate sources, or copyright/proprietary rights holders, and for maintaining a permanent file of all releases obtained. Documents for which releases have been obtained must reflect this permission via appropriate Reproduction Release labels affixed to their covers. [1]

6. A Clearinghouse acquiring a document falling within the scope of another Clearinghouse should transfer that document to the appropriate Clearinghouse promptly and directly.

7. A Clearinghouse selecting a document that overlaps the interests of other Clearinghouses must be careful to index that document from the viewpoints of the other Clearinghouses, as well as its own. When assigning documents to Clearinghouses, the Facility is required, in scope overlap situations, to alert all parties concerned by affixing a "Scope Overlap Label" to the title page, identifying the Clearinghouses involved. Copies of the labeled title page are sent to all alternative Clearinghouses.

8. *All* documents forwarded for inclusion in RIE must bear an OERI Policy Disclaimer Label stating that the document does not necessarily reflect official OERI policy.

9. The use of Reply Cards (Acknowledgments to Contributors) is optional. Each Clearinghouse may choose to use them or not. However, care should be taken not to send automatically such routine "thank you" notes to inappropriate sources, e.g., a State Governor's office. Self-addressed reply cards affixed to documents by source institutions (or by the ERIC Facility on behalf of the source) should be detached by the Clearinghouses and mailed *only* if the document is rejected; if the document is selected, they should be left affixed throughout processing, since the Facility will later record on them the ED number before returning them to the source.

---

[1] NOTE: Beginning with the input for the January 1993 issue of RIE, original individual signed Reproduction Release Forms should be attached and will be filmed as the last page of the document to which they pertain. Reproduction Release Forms prior to this date must still be retained indefinitely by the Clearinghouse.

10. A completed "Clearinghouse Accession Log Sheet" must accompany *each* shipment of documents from Clearinghouses to the Facility.

11. All packing, wrapping, labeling, and addressing must conform to regulations and limitations of the U.S. Postal Service (or other commercial delivery service, such as UPS, that might be used in lieu of USPS).

12. ERIC database materials shipped from Clearinghouses to the Facility via the U.S. Postal Service should be sent Certified Mail, unless otherwise directed, in order to ensure traceability. Commercial delivery companies (such as UPS) may be used if an equivalent service is available.

13. Shipments of ERIC materials from Clearinghouses to the Facility should be made weekly and should conform to the "RIE Master Schedule" published at the beginning of each calendar year.

14. In general, Clearinghouses should avoid requesting the return of documents submitted for announcement in RIE and filming by EDRS. Filming requires that the document be taken apart. Original documents must be retained at EDRS for a period of at least four (4) months in order to be able to respond to possible refilming needs. The return of a document represents a significant amount of extra work.

15. PRIORITY documents must be kept separate from regular input. They should be shipped separately and should have their own individual Log Sheet.

16. Information external to the document (e.g., letters from the source, news releases, etc.), that may be of use to document processors, should be retained with the document throughout the entire processing and editing cycle.

17. Clearinghouse Accession Numbers should be assigned sequentially, without gaps, and in a way that does not "waste" numbers. Each Clearinghouse has been allocated a total of 999,999 numbers with which to work.

18. Documents must be prepared properly for filming by EDRS. All pages and sections must be present. There should be no confusion as to the proper sequence of pages or document parts. Oversize pages in the original must be converted to a series of 8½" x 11" (or 11" x 8½" "landscape") pages. Basically, the Clearinghouse should prepare a document *exactly* as they would like to see it recorded on film and delivered in reproduced paper copy to on-demand customers. The resulting package of pages should permit the EDRS camera operator to film the document routinely and without the necessity of additional remedial actions.

IV. HANDLING AND SHIPPING

A. Introduction

This section describes the procedures for handling and shipping documents for RIE and journals for CIJE. After documents are acquired, specific forms and procedures are necessary in order to prepare the materials for processing (selection, cataloging, indexing, abstracting). After processing is completed, additional guidelines must be followed in wrapping, packing, labeling, and shipping documents from one point to another.

B. Facility Handling

1. Receiving Candidate Documents for RIE

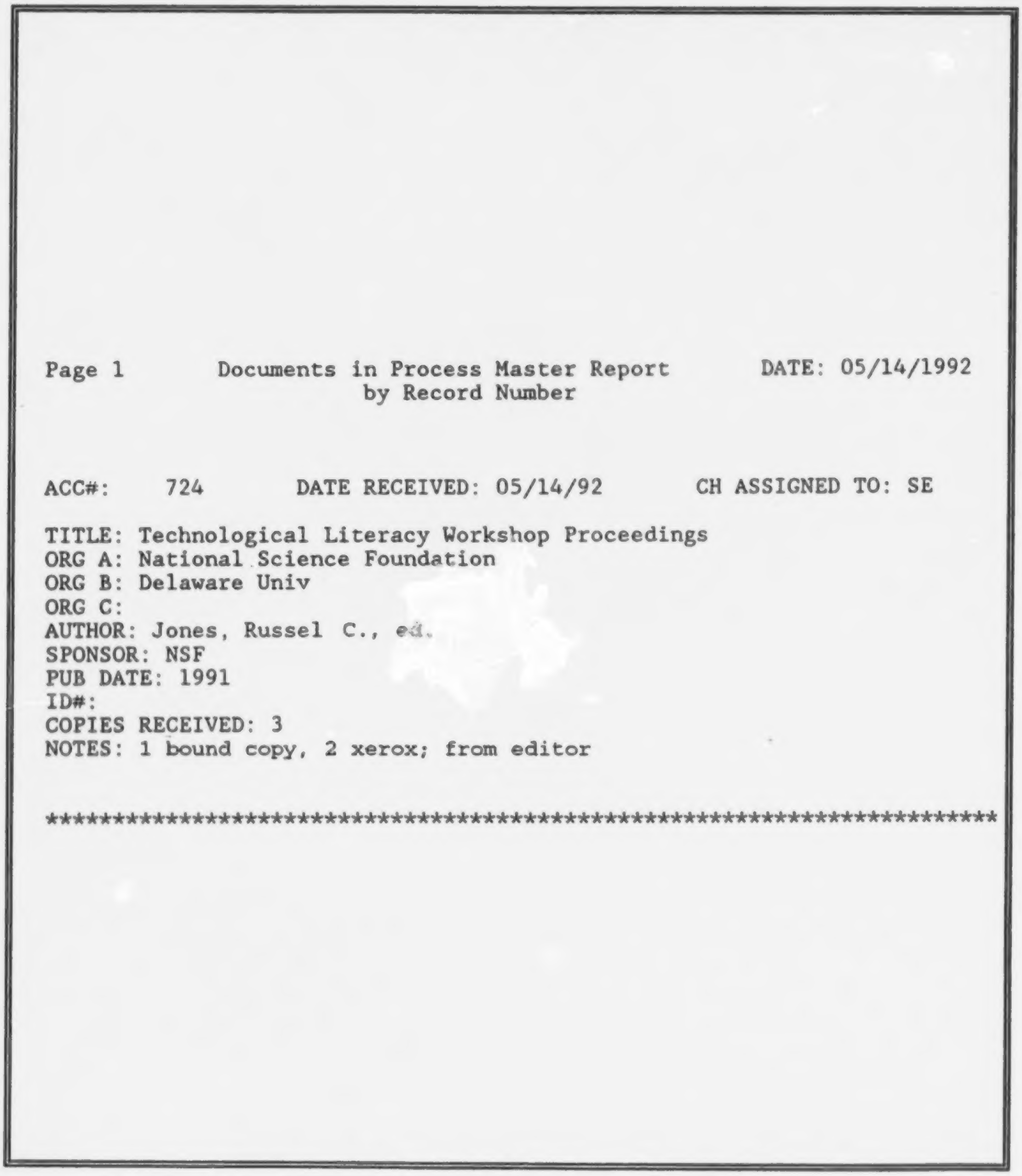
Approximately 6,000 documents are received annually at the Facility, either by mail or messenger, solicited and unsolicited, as candidates for RIE. These documents are received by the Acquisitions Department where they are processed (see below) and then assigned to appropriate Clearinghouses for evaluation and possible selection. After packages are opened, the wrappings are discarded, unless they contain some useful identifying information not found elsewhere, e.g., sender's name and address. The Facility's procedures for handling documents in these early stages include the following:

a. Checking of Documents in Process (DIP)

All documents are first checked against the Facility's internal "Documents in Process" (DIP) file to see if they have previously been received or requested by the Facility. (Since documents arrive from a variety of sources, it is possible for a document to be on-order, but to arrive independent of that order.) Orders completed by receipt of a document are noted as such.

b. Establishing Title Control of In-Process Documents

Entries for the "Documents in Process" (DIP) system are prepared for all documents received at the Facility. The titles are transcribed exactly as they appear on the document. Personal and corporate authors, report numbers, publication date, sponsoring agencies, series notes, and other identifying data are recorded, if provided. Each entry also records the date the item was received, the copies received, and the final disposition (see **Figure IV-1**). The DIP file serves as a record of all material received by the Facility. It is used to answer the questions of contributors, Clearinghouses, and Central ERIC. It is a record of all documents that have passed through the Facility on their way to the Clearinghouses. When the processing of a document is complete and an ED accession number is assigned, it ceases to be considered "in-process." Records in this file are retained for a two-year period and are then removed.



```
Page 1       Documents in Process Master Report       DATE: 05/14/1992
                        by Record Number


ACC#:    724       DATE RECEIVED: 05/14/92       CH ASSIGNED TO: SE

TITLE: Technological Literacy Workshop Proceedings
ORG A: National Science Foundation
ORG B: Delaware Univ
ORG C:
AUTHOR: Jones, Russel C., ed.
SPONSOR: NSF
PUB DATE: 1991
ID#:
COPIES RECEIVED: 3
NOTES: 1 bound copy, 2 xerox; from editor


*************************************************************************
```

FIGURE IV-1: Documents in Process (DIP) System—Sample Entry

c. Duplicate Checking

The primary responsibility for ensuring that documents already in the ERIC system are not processed again lies with the Clearinghouses. The earlier that duplicates are discovered, the greater the savings in time, money, and processing effort.

However, the Facility routinely duplicate checks all older documents it receives in the *Title Index* (a record of items in the ERIC database), *Acquisitions Data Report* (a record of documents in process at the Clearinghouses), and the Facility's Documents in Process (DIP) file. (One of the ERIC-on-CD-ROM systems also may be used in lieu of the *Title Index.*) The only Facility check of recently-published documents occurs when the DIP file is searched. If an entry is found in the DIP file, indicating previous receipt of the document, the document is either discarded or sent to the Clearinghouse as a "2d copy" or "Duplicate."

The decentralized nature of the ERIC system and of its acquisitions efforts results in the Clearinghouses receiving, from various sources other than the Facility, documents that are either already in the system or in-process at their own or other Clearinghouses. Consequently, the Clearinghouses *must* check their own internal records, the *Acquisitions Data Report*, and the *Title Index*, in an attempt to avoid duplicate processing.

Clearinghouses receiving Department of Education/OERI reports directly from sources other than the Facility are advised (see **Section IV.C.1.d**] to notify the Facility, because the document may already be in process elsewhere in the system. When such notification is received, an entry is made in the DIP file, thereby preventing possible later assignment of this same document to a different Clearinghouse.

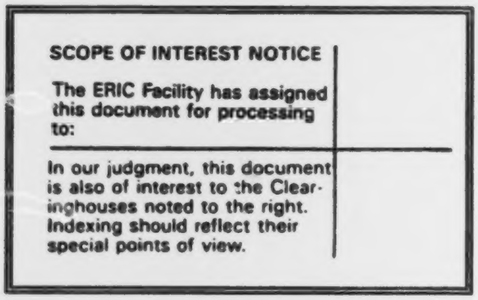
d. Information of Use to Document Processors

Some documents acquired by the Facility are accompanied by information (such as press releases or copies of letters granting permission to reproduce or providing authorship, ordering, or price information), that is essential for a complete and accurate document description. Sometimes information such as address or author affiliation is contained on the outside wrappers and nowhere else. All such information is attached when forwarding documents to Clearinghouses. In general, the Facility sends along any information that might help the Clearinghouses identify, catalog, or otherwise process a document.

e. Assigning Documents to Clearinghouses (and Use of Scope Overlap Sticker)

Documents received by the Facility are assigned, on the basis of their subject matter, to the appropriate ERIC Clearinghouses for selection and processing (cataloging, indexing, abstracting). The *ERIC Clearinghouse Scope of Interest Guide* (Appendix A) is the authority for assigning documents. Various problems may arise during assignment. Documents dealing with single unified topics such as "Teaching English to Sixth Graders" can be assigned quickly, correctly, and with certainty; documents dealing with multi-disciplinary topics (or mixes of target populations and topics), such as "Structural Variables Affecting CAI Performance on Arithmetic Word Problems of Disadvantaged and Deaf Students," can overlap the scopes of several Clearinghouses. It may be necessary to scan the Table of Contents, Introduction, Conclusion, and even the body of such documents, to determine their major thrust.

In general, the Facility is required to spend the minimum time consistent with reasonable and logical assignments on this activity. If a document overlaps the scopes of two or more Clearinghouses, a Scope Overlap Label (**Figure IV-2**) is affixed to the cover. A reproduced copy of the cover bearing such a sticker is then sent to each of the alternative Clearinghouses; this action serves to alert each such Clearinghouse to the fact that a document of interest to them has been assigned to another Clearinghouse. If a Clearinghouse questions an assignment, it can contact directly the "prime" Clearinghouse that received the document and negotiate which Clearinghouse should process the document. The label also serves to alert the Clearinghouse that received the document of the need to take account, during the indexing process, of the scope and viewpoints of the alternative Clearinghouses. The lists of "Most Frequently Used Index Terms" provided in the *ERIC Clearinghouse Scope of Interest Guide* (Appendix A) can be helpful in this process.



SCOPE OF INTEREST NOTICE

The ERIC Facility has assigned this document for processing to:

In our judgment, this document is also of interest to the Clearinghouses noted to the right. Indexing should reflect their special points of view.

FIGURE IV-2: Scope Overlap Label

Note that Clearinghouse assignment, and the number of copies received, are recorded in the DIP file. If duplicate copies of the document are received later, they can be directed, if necessary, to the same Clearinghouse.

f. Special Instructions, Guidelines, etc.

From time to time, special instructions are forwarded from the Facility to Clearinghouses along with documents that require special handling. For example, a set of papers commissioned by NCES for a workshop on one of the National Education Goals may not display any of this information on their covers. The Facility may be aware of this information because of its direct contact with the contributor. In such a case, the Facility will devise a recommended Note to be included in the cataloging of each document by those Clearinghouses assigned the materials.

g. PRIORITIES in Document Handling

There are three classes of ERIC document handling:

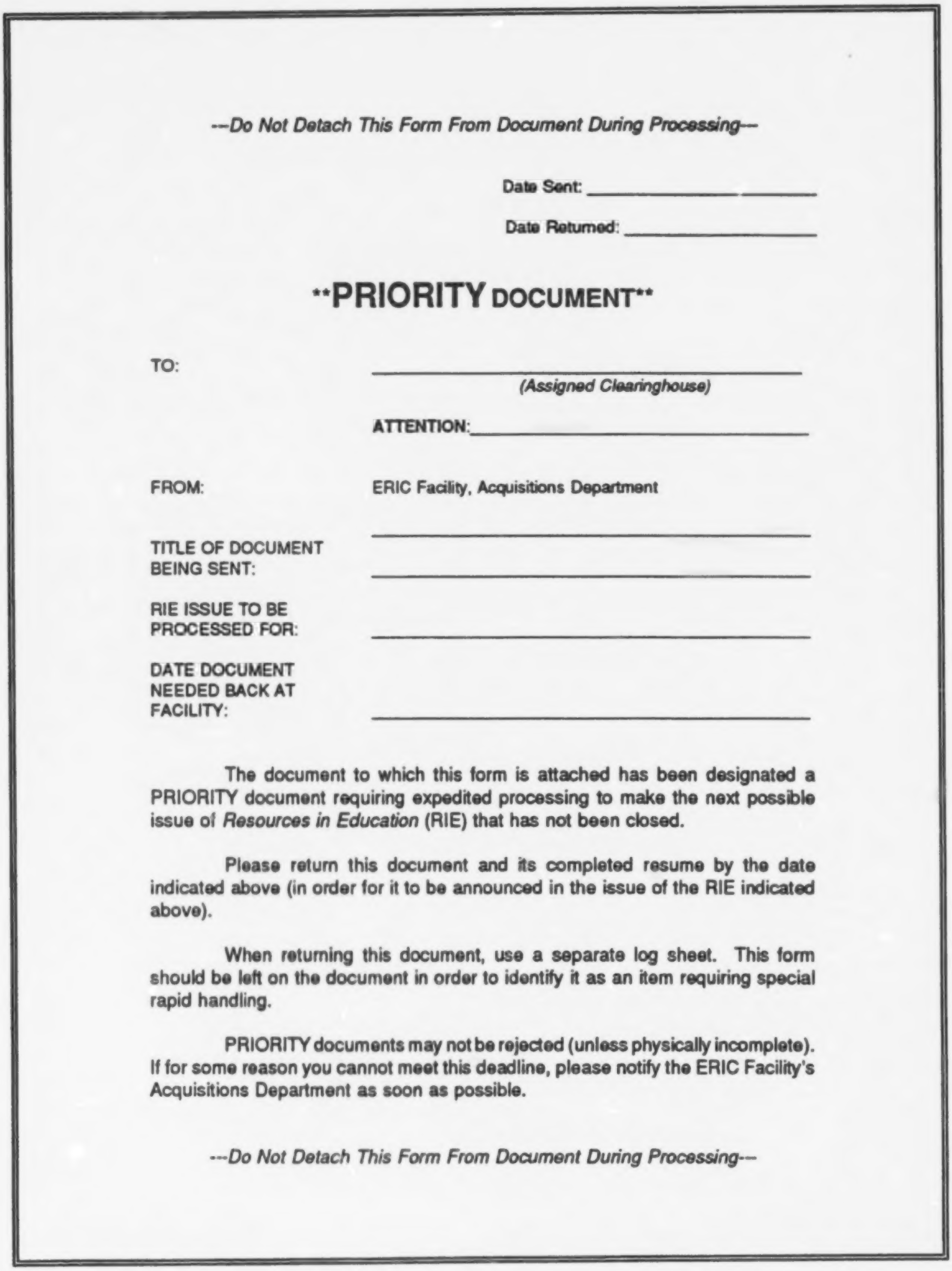
- **Routine Document**—to be handled normally, regularly, on a first in/first out basis.
- **Department of Education Document**—to take precedence over other routine documents, i.e., to be put at the top of the pile, the front of the line.
- **PRIORITY Document**—to be processed in time to make the very next available issue of RIE; may require expedited processing and turnaround and special rapid handling.

PRIORITY documents are generally designated as such by Central ERIC and are then tagged by the Facility using a PRIORITY Document Handling Form (see **Figure IV-3**) affixed to the cover prior to sending it to a Clearinghouse. The form must remain with the document at all times and accompany it on its return to the Facility. PRIORITY documents must be processed before all other documents and must be shipped separately by the fastest means from the Facility to the Clearinghouses.

PRIORITY documents may not be rejected (unless physically incomplete). The next issue of RIE still open to accessions is marked on the PRIORITY form and can also be determined from the RIE Master Schedule. In some cases, when the RIE issue deadline is very close, it may be necessary to process PRIORITY documents in a matter of a few days. To alert Clearinghouses to such needs, the Facility generally calls ahead to notify a Clearinghouse of an upcoming PRIORITY document assignment.

Department of Education documents need not be processed on an expedited PRIORITY basis, but when received they should be the next documents processed at the regular/routine rate. That is to say, they should be pulled out and put next in line.

Department of Education documents are identified by the Facility using a special Department of Education Document Handling Form (see **Figure IV-4**) that is affixed to the cover prior to transmittal to the Clearinghouse. Department of Education documents will normally be selected for the ERIC database. If for some reason a Department of Education document is rejected, the reason justifying this rejection must be provided on this form and both document and form returned to the Facility, for review by Central ERIC.



---Do Not Detach This Form From Document During Processing---

Date Sent: ____________________

Date Returned: ____________________

PRIORITY DOCUMENT

TO: ______________________________
(Assigned Clearinghouse)

ATTENTION: ______________________________

FROM: ERIC Facility, Acquisitions Department

TITLE OF DOCUMENT BEING SENT: ______________________________

RIE ISSUE TO BE PROCESSED FOR: ______________________________

DATE DOCUMENT NEEDED BACK AT FACILITY: ______________________________

The document to which this form is attached has been designated a PRIORITY document requiring expedited processing to make the next possible issue of *Resources in Education* (RIE) that has not been closed.

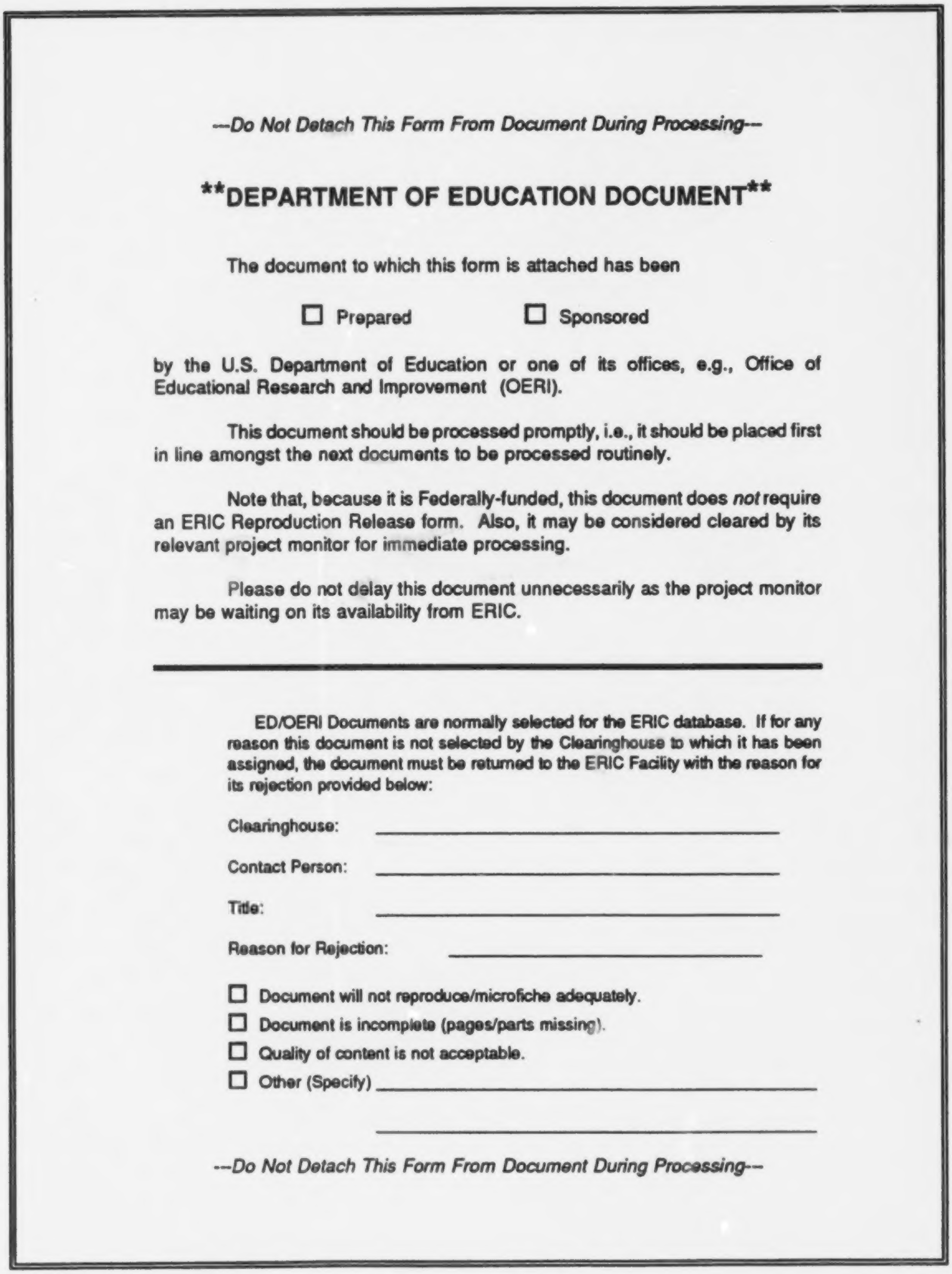
Please return this document and its completed resume by the date indicated above (in order for it to be announced in the issue of the RIE indicated above).

When returning this document, use a separate log sheet. This form should be left on the document in order to identify it as an item requiring special rapid handling.

PRIORITY documents may not be rejected (unless physically incomplete). If for some reason you cannot meet this deadline, please notify the ERIC Facility's Acquisitions Department as soon as possible.

---Do Not Detach This Form From Document During Processing---

FIGURE IV-3: PRIORITY Document Handling Form



--Do Not Detach This Form From Document During Processing--

DEPARTMENT OF EDUCATION DOCUMENT

The document to which this form is attached has been

☐ Prepared ☐ Sponsored

by the U.S. Department of Education or one of its offices, e.g., Office of Educational Research and Improvement (OERI).

This document should be processed promptly, i.e., it should be placed first in line amongst the next documents to be processed routinely.

Note that, because it is Federally-funded, this document does *not* require an ERIC Reproduction Release form. Also, it may be considered cleared by its relevant project monitor for immediate processing.

Please do not delay this document unnecessarily as the project monitor may be waiting on its availability from ERIC.

ED/OERI Documents are normally selected for the ERIC database. If for any reason this document is not selected by the Clearinghouse to which it has been assigned, the document must be returned to the ERIC Facility with the reason for its rejection provided below:

Clearinghouse: ____________________

Contact Person: ____________________

Title: ____________________

Reason for Rejection: ____________________

☐ Document will not reproduce/microfiche adequately.
☐ Document is incomplete (pages/parts missing).
☐ Quality of content is not acceptable.
☐ Other (Specify) ____________________

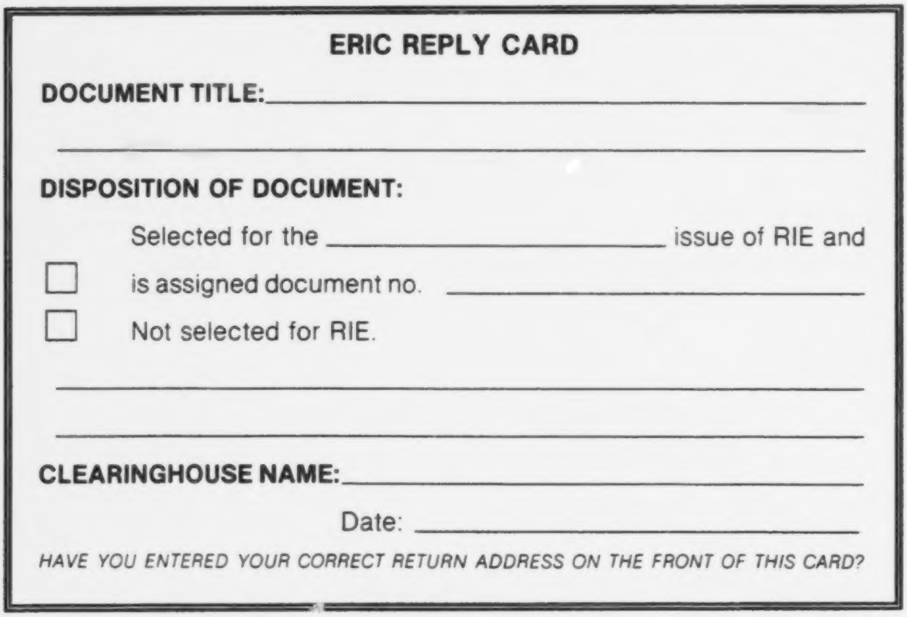
____

--Do Not Detach This Form From Document During Processing--

FIGURE IV-4: Department of Education Document Handling Form

h. Reply Cards (Acknowledgments to Contributors)

As a courtesy, all contributors must be notified of the disposition of their documents, including the ED numbers assigned if the documents are selected. Providing such a service can be a powerful inducement to contributors and, as such, a valuable acquisitions tool. To provide this information to contributors, a standard "ERIC Reply Card" has been developed (see **Figure IV-5**). This card can be provided in quantity to regular document sources, who are requested to complete it, self-address it, stamp it, and affix it to the cover of documents being contributed. Alternatively, the Facility or the Clearinghouse may affix such a card for a contributor.



ERIC REPLY CARD

DOCUMENT TITLE: ______________________________

____

DISPOSITION OF DOCUMENT:

Selected for the ______________ issue of RIE and

☐ is assigned document no. ______________

☐ Not selected for RIE.

____

____

CLEARINGHOUSE NAME: ______________________________

Date: ______________

HAVE YOU ENTERED YOUR CORRECT RETURN ADDRESS ON THE FRONT OF THIS CARD?

FIGURE IV-5: ERIC Reply Card

If a Clearinghouse rejects a document, the decision should be indicated in the appropriate place on the card and the card mailed to the contributor. (Supplying a reason for non-selection is optional and at the discretion of the Clearinghouse.)

If a Clearinghouse selects a document for RIE announcement, the card should be left attached to the document when it is returned to the Facility. Reply Cards attached by the Department of Education or by the Facility Acquisitions Department should never be replaced by Clearinghouse reply cards, because the addressee is often very specific. The Facility will enter on the card the ED number assigned to the document and then mail the card back to the contributor as soon as possible.

Clearinghouses may use Reply Cards, form letters, or other means to notify contributors after the relevant issue of RIE has been published. Clearinghouse systems for thanking or otherwise notifying document contributors are entirely optional and should not be regarded as either replacing or being replaced by the Reply Card system described here.

2. Handling of Documents Shipped to the Facility by Clearinghouses for Inclusion in RIE

Every week, by mail or commercial carrier, the Facility's Document Control Department receives shipments from the Clearinghouses of documents for inclusion in RIE. The following procedures are used:

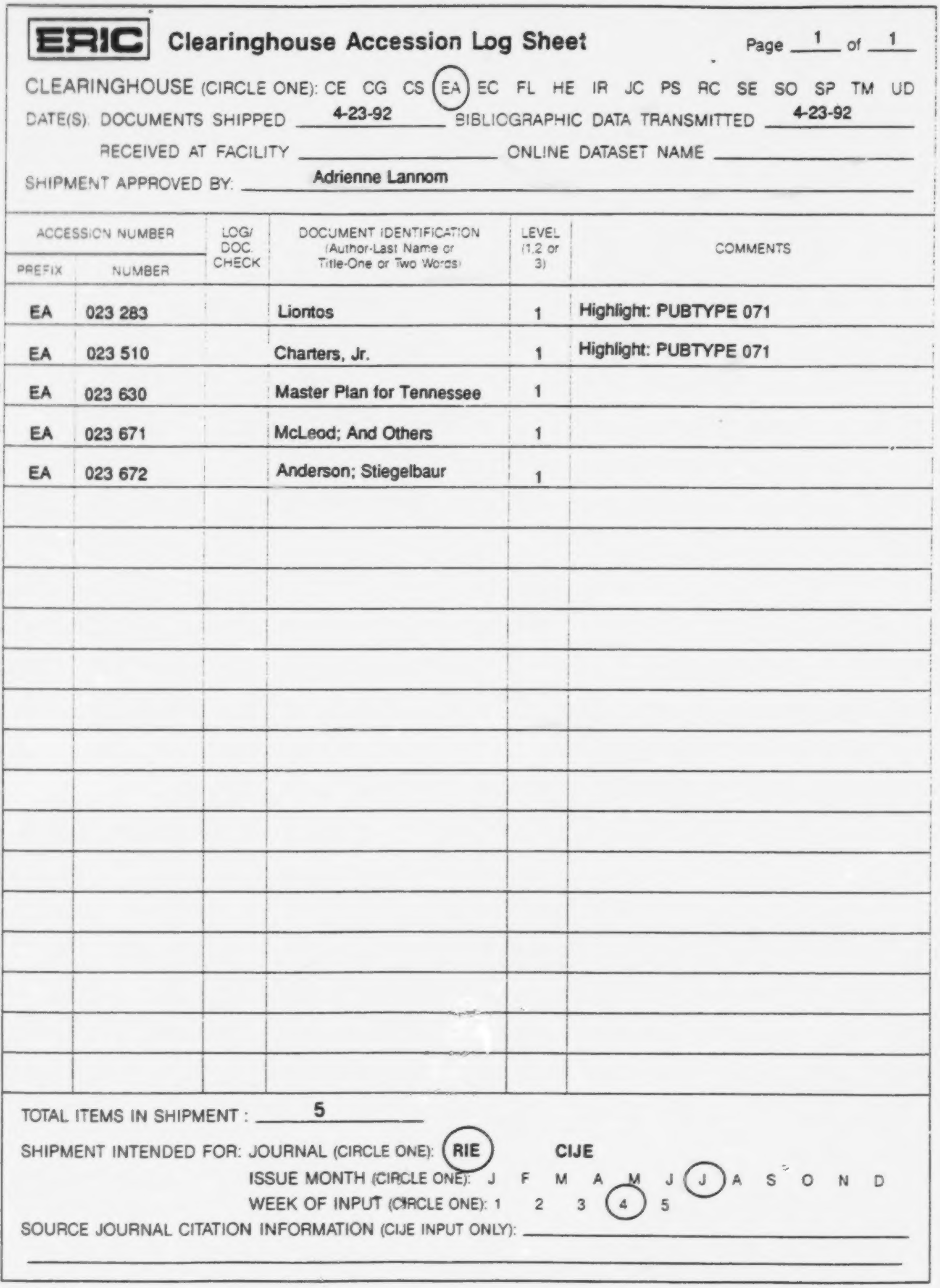
a. Shipment Verification

After receiving a shipment of documents from a Clearinghouse, the Facility verifies the contents against the Clearinghouse Log Sheet (**Figure IV-6A**). Any discrepancy is resolved by telephone with the Clearinghouse. Records are kept of documents input for each weekly shipment for RIE. A notation is made when a Clearinghouse abstains. If a Clearinghouse abstains for two weeks running, a check is made by the Document Control Supervisor to determine the reason and Central ERIC is notified. PRIORITY documents must have their own separate Log Sheet (see **Figure IV-6B**) to facilitate expedited processing.

Log Sheets are required for all regular database input shipments from Clearinghouses to the Facility. See **Figure IV-15(A)** for a sample Log Sheet for CIJE input. See **Figure IV-15(B)** for a sample Log Sheet for input of full-text Digests for the ERIC Digests Online (EDO) file.

b. Pagination

After receipt and verification, the documents are paginated. The Paginator hand stamps every page according to the instructions given in Section V: "Cataloging." After pagination, documents are returned to the Editorial Department where the editorial function takes place.



ERIC Clearinghouse Accession Log Sheet

Page 1 of 1

CLEARINGHOUSE (CIRCLE ONE): CE CG CS [✓ EA] EC FL HE IR JC PS RC SE SO SP TM UD

DATE(S): DOCUMENTS SHIPPED 4-23-92 BIBLIOGRAPHIC DATA TRANSMITTED 4-23-92

RECEIVED AT FACILITY ______ ONLINE DATASET NAME ______

SHIPMENT APPROVED BY: Adrienne Lannom

	ACCESSION NUMBER		LOG/ DOC. CHECK	DOCUMENT IDENTIFICATION (Author-Last Name or Title-One or Two Words)	LEVEL (1,2 or 3)	COMMENTS
	PREFIX	NUMBER				
1	EA	023 283		Liontos	1	Highlight: PUBTYPE 071
2	EA	023 510		Charters, Jr.	1	Highlight: PUBTYPE 071
3	EA	023 630		Master Plan for Tennessee	1	
4	EA	023 671		McLeod; And Others	1	
5	EA	023 672		Anderson; Stiegelbaur	1	
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

TOTAL ITEMS IN SHIPMENT : 5

SHIPMENT INTENDED FOR: JOURNAL (CIRCLE ONE): [✓ RIE] CIJE

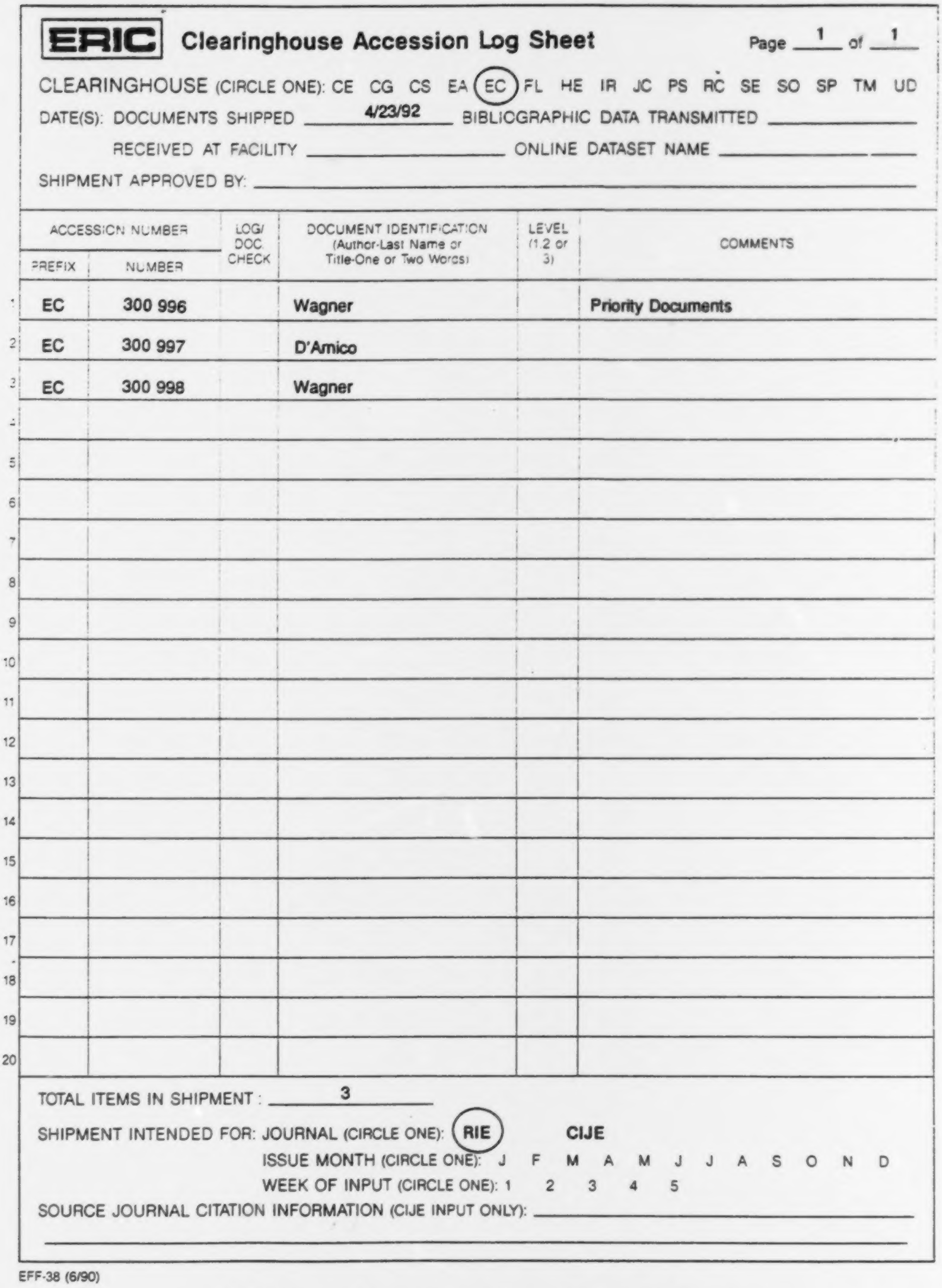
ISSUE MONTH (CIRCLE ONE): J F M A M J [✓ J] A S O N D

WEEK OF INPUT (CIRCLE ONE): 1 2 3 [✓ 4] 5

SOURCE JOURNAL CITATION INFORMATION (CIJE INPUT ONLY): ______

EFF-38 (6/90)

FIGURE IV-6: Clearinghouse Accession Log Sheet (Completed)
A. Regular Document Shipment



ERIC Clearinghouse Accession Log Sheet

Page 1 of 1

CLEARINGHOUSE (CIRCLE ONE): CE CG CS EA [✓ EC] FL HE IR JC PS RC SE SO SP TM UD

DATE(S): DOCUMENTS SHIPPED 4/23/92 BIBLIOGRAPHIC DATA TRANSMITTED ____________

RECEIVED AT FACILITY ____________ ONLINE DATASET NAME ____________

SHIPMENT APPROVED BY: ____________

	ACCESSION NUMBER		LOG/ DOC CHECK	DOCUMENT IDENTIFICATION (Author-Last Name or Title-One or Two Words)	LEVEL (1,2 or 3)	COMMENTS
	PREFIX	NUMBER				
1	EC	300 996		Wagner		Priority Documents
2	EC	300 997		D'Amico		
3	EC	300 998		Wagner		
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

TOTAL ITEMS IN SHIPMENT : 3

SHIPMENT INTENDED FOR: JOURNAL (CIRCLE ONE): [✓ RIE] CIJE

ISSUE MONTH (CIRCLE ONE): J F M A M J J A S O N D

WEEK OF INPUT (CIRCLE ONE): 1 2 3 4 5

SOURCE JOURNAL CITATION INFORMATION (CIJE INPUT ONLY): ____________

EFF-38 (6/90)

FIGURE IV-6: Clearinghouse Accession Log Sheet (Completed)
B. PRIORITY Document Shipment

c. ERIC Program Office Review

Representatives from the ERIC Program Office (commonly known as Central ERIC) occasionally review documents going into RIE. From time to time, individual Clearinghouse monitors also join in the review. Documents are reviewed for reproducibility problems, quality of content, and appropriateness of subject matter. Questionable documents may be removed and discussed with Clearinghouses by the Clearinghouse monitors. As a result of this review, the monitor arrives at a decision to either reject the given document or to reinsert it into the RIE production stream. Care is taken by the Facility to record all such removals so that no document is lost or misplaced.

d. Duplicates

Despite all checks made by both the Facility and the Clearinghouses, some duplicates arrive at the Facility for inclusion in RIE. Immediately prior to preparing an issue of RIE, the Facility does a duplicate check by title using the computer to search the ERIC Master File *and* the issue in preparation. This "final filter," verified manually by the editors, detects any remaining duplicates. These documents are then removed from the issue. Duplicates are returned to the submitting Clearinghouse. A monthly report is prepared for Central ERIC (see **Figure IV-7**) listing these duplicates and indicating the issue of RIE in which they were first announced. It is generally considered that duplicates of items announced three or more months prior should have been caught by the Clearinghouse, whereas duplicates of items in process, or in an RIE issue that has not yet been published, are more understandable. Duplication of one's own prior input is, however, considered unacceptable.

e. ED Number Assignment

ED Accession Numbers are assigned automatically to documents by the computer system as one of the last steps in computer processing. This action is delayed so that documents that are duplicates, unfilmable, rejected, etc., can be removed before final accession number assignment takes place. The resulting unbroken sequence of ED numbers is a system feature that is very useful to readers of the RIE journal, users of the magnetic tapes, and subscribers to the ERIC microfiche collection.

When the computer assignment of the ED numbers has been completed, the Facility's Document Control Clerk records the ED number in a standard position (upper left hand corner) on the cover (or first sheet to be filmed) of each document.

f. Single-Frame Resumes

Computer-produced "Single-Frame Resumes" (printouts of the final computer record for each accession) are matched with the documents prior to their transfer to EDRS. These later become "Page 1" of each document's microfiche. Additional copies of the "Single-Frame Resumes" are sent to each Clearinghouse at the same time, as advance notice of their RIE announcements for that issue. **Figure IV-8** depicts a typical Single Frame Resume.

```
                                   RIE
                              December 1991
                          Remove Summary Report
                                   (40)

1.   Duplicates (5)

A.   Duplicates of a Clearinghouse's Own Input (2)

                                                     Originally          Detected
     Duplicates Detected        Duplicates of        Announced in RIE    By

     EA 023 176                 ED 303 914/EA 020 745   JUL89            FAC
     SE 052 221                 ED 306 143/SE 050 562   SEP89            FAC

B.   Duplicates Appearing in RIE Three Months or More - September 1991 or Earlier (0)

C.   Duplicates Appearing in October - December 1991 (3)

     SE 052 202                 ED 335 365/TM 016 959   DEC91            FAC
     UD 028 091                 ED 331 294/FL 019 132   SEP91            FAC
     UD 028 096                 ED 333 042/TM 016 582   DEC91            FAC

D.   Total All Duplicates Appearing in 1991 = 189

2.   Removes

     Accession Removed     Reason for Removal

     CG 023 532       SCOPE (NOT EDUC-RELATED
     CG 023 533       SCOPE (NOT EDUC-RELATED
     FL 800 205       COMBINE
     HE 024 102       MISCELLANEOUS (WRONG ACC# USED)
     PS 019 933       COMBINE
     PS 019 936       COMBINE

     Permanent Removes for This Issue = 6

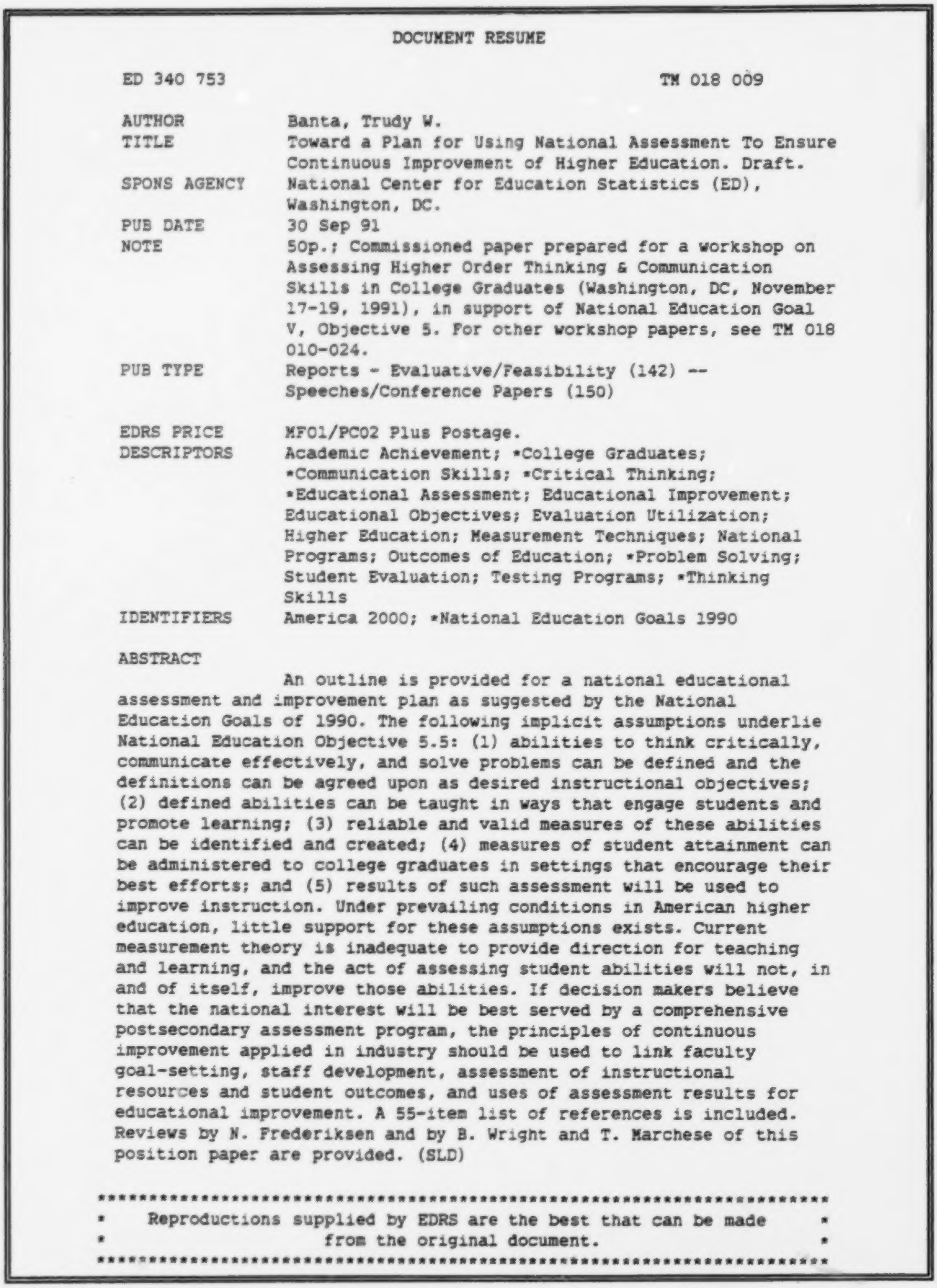
C.   Delays

     Accession Removed     Reason for Removal

     FL 019 250            INCOMPLETE
     FL 019 301            INCOMPLETE
     FL 019 315 - 318      PROCESSING
     FL 800 204            DOC PREP
     HE 023 802            PROCESSING
     HE 024 154            PROCESSING
     JC 910 382            ABSTRACT
     PS 019 708            MOVED TO NOVEMBER 1991
     RC 018 303 - 304      ABSTRACT
     SO 021 332            PROCESSING
     SO 030 483 - 484      RELATED
     UD 228 221 - 233      TRANSFERRED TO JANUARY 1992

Resumes Temporarily Removed from Current Issue = 29
```

FIGURE IV-7: RIE Issue—Remove List



DOCUMENT RESUME

ED 340 753 TM 018 009

AUTHOR	Banta, Trudy W.
TITLE	Toward a Plan for Using National Assessment To Ensure Continuous Improvement of Higher Education. Draft.
SPONS AGENCY	National Center for Education Statistics (ED), Washington, DC.
PUB DATE	30 Sep 91
NOTE	50p.; Commissioned paper prepared for a workshop on Assessing Higher Order Thinking & Communication Skills in College Graduates (Washington, DC, November 17-19, 1991), in support of National Education Goal V, Objective 5. For other workshop papers, see TM 018 010-024.
PUB TYPE	Reports - Evaluative/Feasibility (142) -- Speeches/Conference Papers (150)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	Academic Achievement; *College Graduates; *Communication Skills; *Critical Thinking; *Educational Assessment; Educational Improvement; Educational Objectives; Evaluation Utilization; Higher Education; Measurement Techniques; National Programs; Outcomes of Education; *Problem Solving; Student Evaluation; Testing Programs; *Thinking Skills
IDENTIFIERS	America 2000; *National Education Goals 1990

ABSTRACT

An outline is provided for a national educational assessment and improvement plan as suggested by the National Education Goals of 1990. The following implicit assumptions underlie National Education Objective 5.5: (1) abilities to think critically, communicate effectively, and solve problems can be defined and the definitions can be agreed upon as desired instructional objectives; (2) defined abilities can be taught in ways that engage students and promote learning; (3) reliable and valid measures of these abilities can be identified and created; (4) measures of student attainment can be administered to college graduates in settings that encourage their best efforts; and (5) results of such assessment will be used to improve instruction. Under prevailing conditions in American higher education, little support for these assumptions exists. Current measurement theory is inadequate to provide direction for teaching and learning, and the act of assessing student abilities will not, in and of itself, improve those abilities. If decision makers believe that the national interest will be best served by a comprehensive postsecondary assessment program, the principles of continuous improvement applied in industry should be used to link faculty goal-setting, staff development, assessment of instructional resources and student outcomes, and uses of assessment results for educational improvement. A 55-item list of references is included. Reviews by N. Frederiksen and by B. Wright and T. Marchese of this position paper are provided. (SLD)

****

* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *

****

FIGURE IV-8: Single-Frame Resume (Computer-Produced)

g. Reply Cards

All Reply Cards attached to the documents are removed at this time and the ED number assigned to the document is added to the cards. The Facility's Document Control Department then mails the cards to the contributors.

h. Delivery of Documents to EDRS

Each monthly shipment of documents from the Facility to the ERIC Document Reproduction Service (EDRS) is packaged carefully by the Document Control Department. Special care is taken to arrange the documents in numerical sequence in strong boxes, plainly marked on the outside with the corresponding ED numbers. This expedites the handling and filming of the documents by EDRS. After notification from the Facility, EDRS arranges to have the boxes picked up by a messenger service and delivered to them. Central ERIC is then advised that the shipment has gone to EDRS for microfiche production.

3. Handling Microfiche Shipped to the Facility by EDRS

For each issue of RIE, the Facility receives *two* complete sets of microfiche. One set is housed in the Facility Reference Library for reference and archival purposes. The second set is divided by Clearinghouse, with each segment shipped to the appropriate Clearinghouse for use in distributing complimentary microfiche to contributors.

C. Clearinghouse Handling

1. Receiving

The majority of the documents received by the Clearinghouses arrive through their own efforts. The Facility acquisitions program provides supplementary input. In some cases, documents are transferred from one Clearinghouse to another.

a. Logging, Checking, and Establishing Basic Control

The exact nature of the logs and files maintained by the Clearinghouses to control incoming documents is left to the individual Clearinghouse. As indicated in Section II.E.11, certain basic statistics must be reported quarterly to Central ERIC. It is advisable, therefore, that each Clearinghouse develop a log, file, or other type of record, that gathers, at a minimum, the following types of information about incoming documents: date acquired; title; author; source (e.g., state, local, federal, facility, academic, non-profit, commercial, foreign, international, etc.); contributor (if different from source); and disposition (e.g., RIE, local files, transfer, duplicate, discard, etc.)

It is also a fairly uniform practice among Clearinghouse acquisitions operations to maintain an "On-Order" file, so that the results of specific requests or orders for documents can be determined and followed-up, if necessary.

b. Inter-Clearinghouse Transfers

Any Clearinghouse may send a document directly to another Clearinghouse. Included are those documents received from the Facility (with the exception of PRIORITY documents, which must not be transferred because of the time factor). Clearinghouses should not discard good quality education-related documents just because they are not within their own scope of interest. Such documents should be routed to the most appropriate Clearinghouse, or, if that is ambiguous or uncertain, to the Facility for assignment. Any correspondence and/or supporting documentation, as well as the Reproduction Release Form and a Document Transfer Form, must accompany the transferred document.

If a Clearinghouse learns that a document within its scope is being processed by another Clearinghouse, it is at liberty to contact the other Clearinghouse and negotiate for the document in question.

Document Transfer Forms (see **Figure IV-9**) are available from the Facility's Document Control Department.

c. Information of Use to Document Processors

Clearinghouses must ensure that information of use to document processors (e.g., letters from authors, related press releases, etc.) is not discarded, but is retained with the document.

All special instructions and correspondence arriving with documents from the Facility should also be kept with the documents throughout the document processing phase.

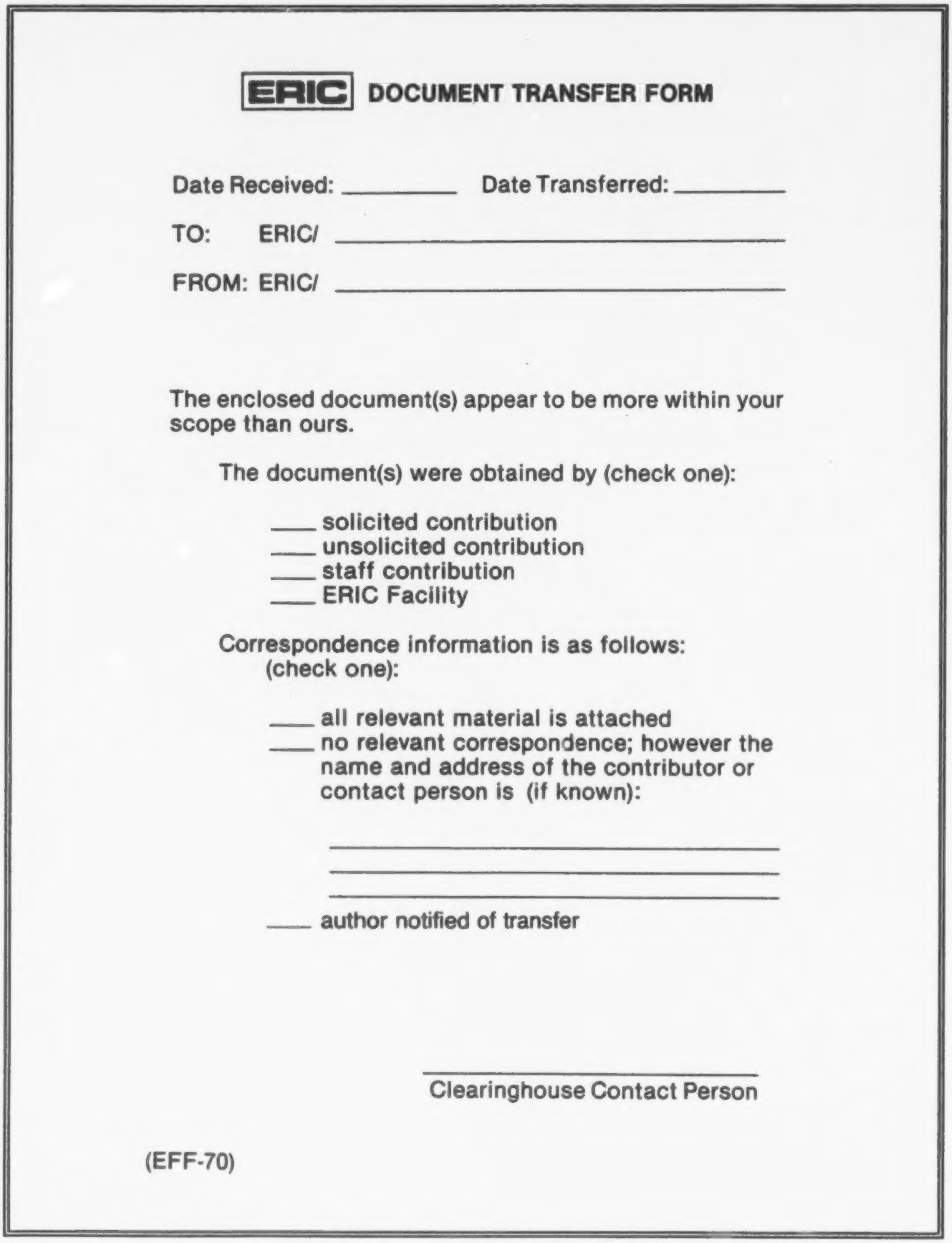
d. Department of Education Prepared Documents

OERI/ED prepared documents need not be cleared formally by OERI/ED Project Officers before being processed. Such documents, whether received from the ERIC Facility or other channels, can be assumed to have been cleared. However, if a Clearinghouse receives an OERI/ED document from a source other than the Facility or a Clearinghouse's assigned acquisitions arrangement (e.g., an OERI R&D Center), the Facility should be notified in order to help prevent duplicate processing.

Any Department of Education document that is sent by the Facility to a Clearinghouse and then *not* selected for RIE must be returned to the Facility with an indication of the reason for rejection. This reason should be recorded on the "Department of Education Document Handling Form" provided with the document (see **Figure IV-4**).

e. Duplicate Checking

It is the responsibility of the Clearinghouses to check all documents received to determine whether they are duplicates of those already in the system or duplicates of items in-process at one of the Clearinghouses (including their own). The further a duplicate proceeds through the system, the more time, money, and effort are wasted.



ERIC **DOCUMENT TRANSFER FORM**

Date Received: ________ Date Transferred: ________

TO: ERIC/ ______________________________

FROM: ERIC/ ______________________________

The enclosed document(s) appear to be more within your scope than ours.

The document(s) were obtained by (check one):

- ___ solicited contribution
- ___ unsolicited contribution
- ___ staff contribution
- ___ ERIC Facility

Correspondence information is as follows:
(check one):

- ___ all relevant material is attached
- ___ no relevant correspondence; however the name and address of the contributor or contact person is (if known):

____
____
____

- ___ author notified of transfer

____
Clearinghouse Contact Person

(EFF-70)

FIGURE IV-9: Document Transfer Form

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When duplicate checking, the first step to be taken is to determine whether the document is already in RIE. In order to determine this, searches should be made of the cumulative *Title Index* (and its quarterly supplements), or, alternatively, vendor versions of the ERIC database in online or CD-ROM form. Close attention should be paid to the date of publication in making this check. For example, a document dated 1990 could not have been announced (in identical form) in 1989 or earlier, thus limiting the search that must be made.

The next step is to identify whether the document is in-process anywhere in the ERIC system. In order to determine this, searches should be made of the *Acquisitions Data Report* (ADR) and of the Clearinghouse's internal files. The ADR is the system-wide tool for determining what is in-process at the various decentralized processing centers of the ERIC network.

If the document is not found in either of the two checks described above, an entry should be made immediately for it in the ADR (see **Section IV.C.1.m** for how to do this). This action essentially "stakes a claim" for the document. (Other Clearinghouses finding an entry for the document in the ADR will realize that it is pre-empted and treat it as a duplicate.) The document may then be passed forward for cataloging, indexing, and abstracting.

If the document is found to be a duplicate and already in RIE, it can be discarded. If it is found to be a duplicate of a document in-process, the ADR "intended use" code should be checked. If the first Clearinghouse in possession of the document has it in a hold status, the second Clearinghouse can evaluate their own document with this information in hand, contacting the first Clearinghouse if desired. If, after negotiation between the two Clearinghouses, the second Clearinghouse turns out to be in a better position to announce the document, an entry reflecting this decision should be prepared for the ADR.

Sometimes two or more Clearinghouses receive the same document simultaneously and their respective entries for the ADR appear there simultaneously. Duplicate ADR entries are identified by an asterisk (*). (**NOTE:** A minor character variation in entry of the title will void the asterisk. The ADR must, therefore, be used carefully, with possible title variants consulted.) When a Clearinghouse detects such entries, it should contact the other Clearinghouse(s) involved and negotiate a settlement satisfactory to all concerned. Similarly, any questions as to which Clearinghouse should most appropriately process a document should be resolved by telephone. Processing information or Reproduction Releases that may already have been generated or obtained by one of the Clearinghouses should be transferred.

f. Reproduction Release Forms and Corresponding Labels

Unless a document (1) has been produced or sponsored by the Federal Government, or (2) specifically waives copyright and reproduction rights, the Clearinghouse should seek permission to reproduce from the copyright (or proprietary rights) holder. This procedure is described in detail in Section II.E.8. In some cases ERIC has already secured Blanket Reproduction Releases. These arrangements are noted in the *ERIC Acquisitions Arrangements* list and this list should be checked to ascertain whether such permission has already been granted. If so, processing can proceed without any further reproduction release action. Reproduction permission should always be obtained on a standard form (**Figures IV-10(A-B)**). Signed release forms must be kept on file indefinitely at the Clearinghouses obtaining them.[2]

If permission to reproduce for ERIC purposes is obtained, the Clearinghouse must affix the appropriate Level 1 or Level 2 Reproduction Release Label (**Figures IV-11A-B**), with the name of the authorizing person or organization filled in, to the cover (or first sheet to be filmed) of the document (**Figure IV-12**). This procedure ensures that the labels will appear prominently on the first frame of the microfiche.

NOTE: The labels should reflect *the permission actually given.* If subsequent decisions relative to reproducibility cause a reduction in processing Level from 1 to 2, 1 to 3, or 2 to 3, this should not affect the label. EDRS determines filming level from the computer record, not from the label.

g. OERI Policy Disclaimer Label

It is important that recipients of ERIC microfiche and reproduced paper copies of documents understand that the documents are collected from a variety of sources and that they are not necessarily reflections of OERI official positions. It is common for organizations such as ERIC, producing abstract journals and operating information systems, to "disclaim" responsibility for the documents they control and disseminate.

To this end, a standard OERI *Policy Disclaimer Label* (**Figure IV-13**) *must be properly marked and affixed to every document processed at Level 1 or Level 2.* (In the case of Level 3, there is no document in hand and none is later disseminated by ERIC, so no sticker is required.)

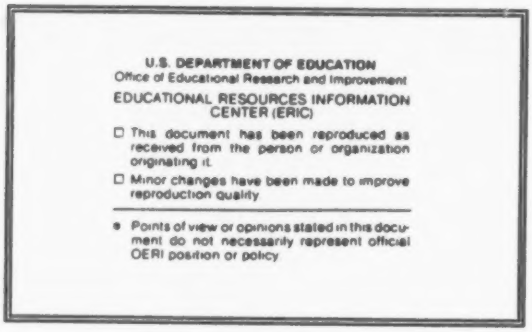

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FIGURE IV-13: OERI Policy Disclaimer Label

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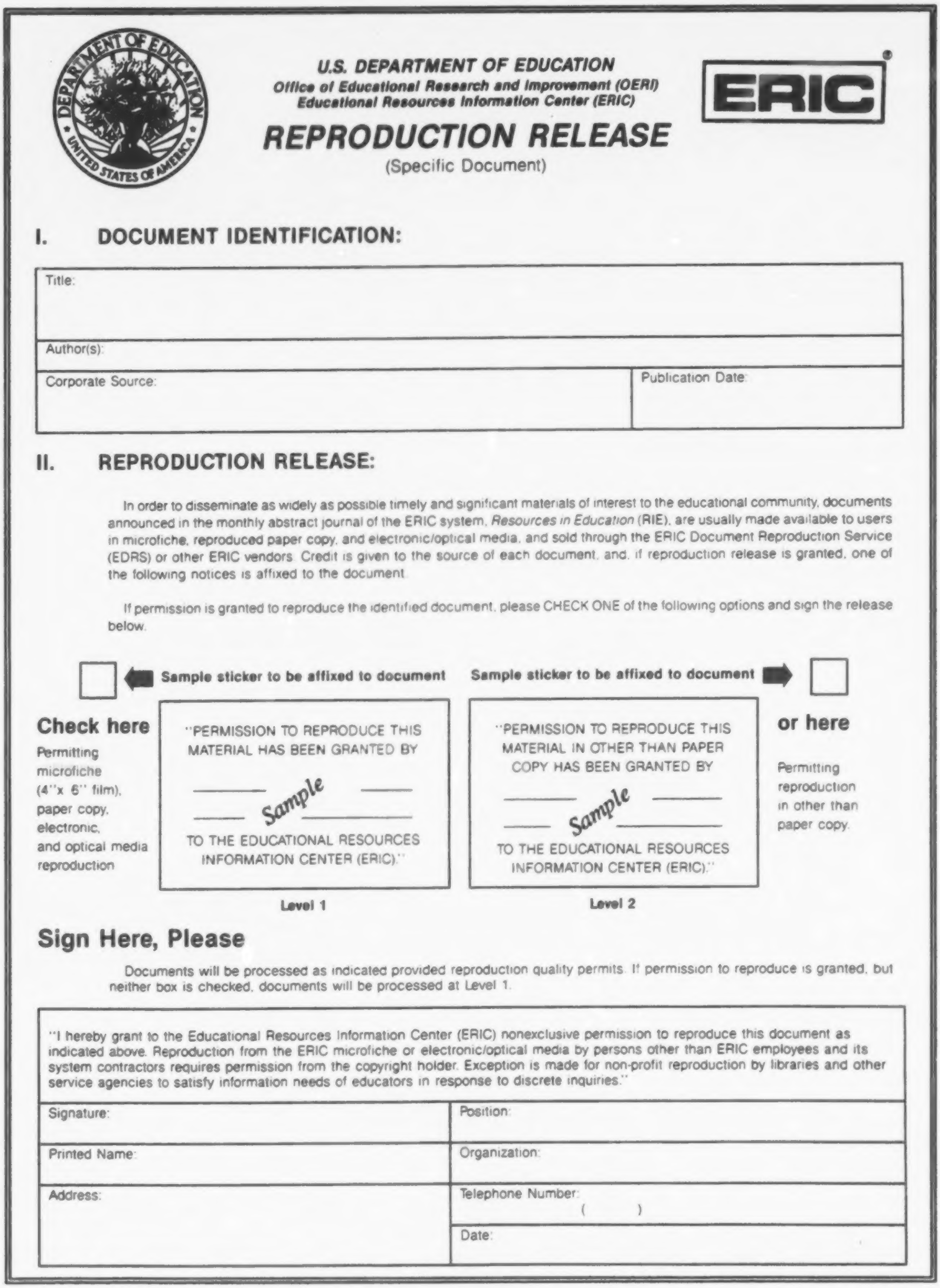
[2] NOTE: Beginning with the input for the January 1993 issue of RIE, original individual signed Reproduction Release Forms should be attached and will be filmed as the last page of the document to which they pertain. Reproduction Release Forms prior to this date must still be retained indefinitely by the Clearinghouse.



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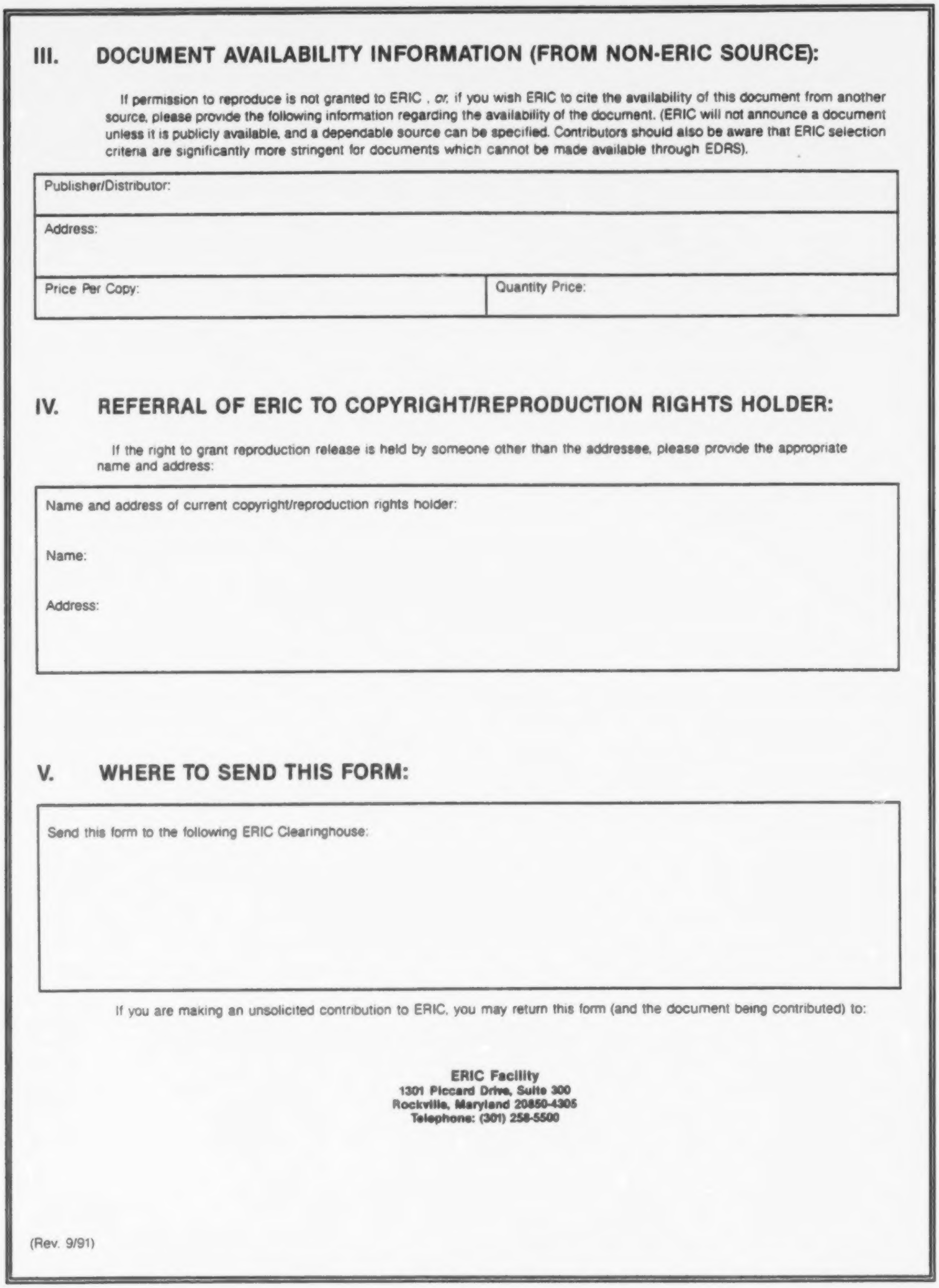
Signature:	Position:
Printed Name:	Organization:
Address:	Telephone Number: ( )
	Date:

OVER

FIGURE 10: Reproduction Release Form
A. Specific Document (Page 1 of 2)



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Address:

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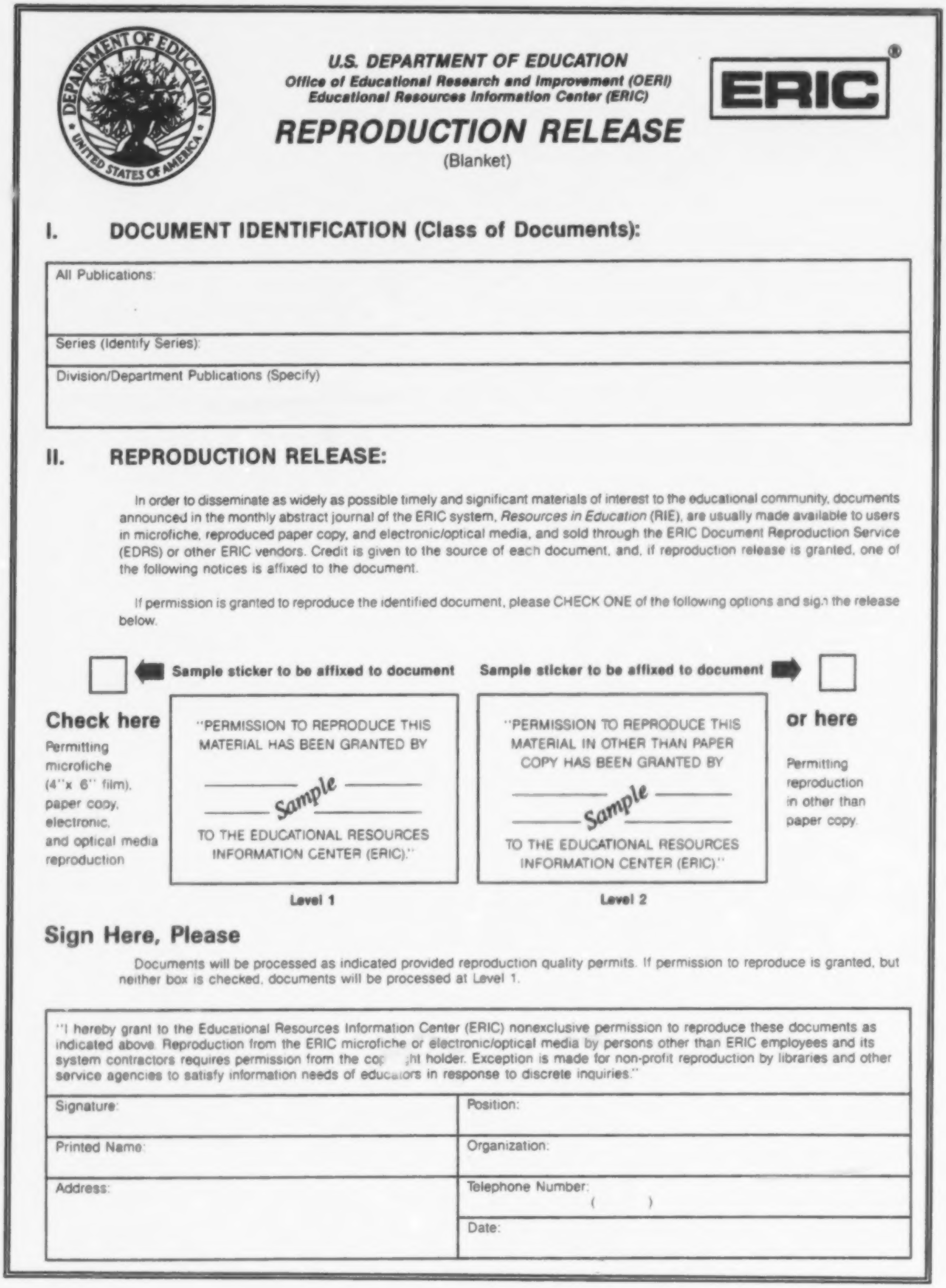
Rockville, Maryland 20850-4305
Telephone: (301) 258-5500

(Rev. 9/91)

FIGURE 10: **Reproduction Release Form**
A. Specific Document (Page 2 of 2)



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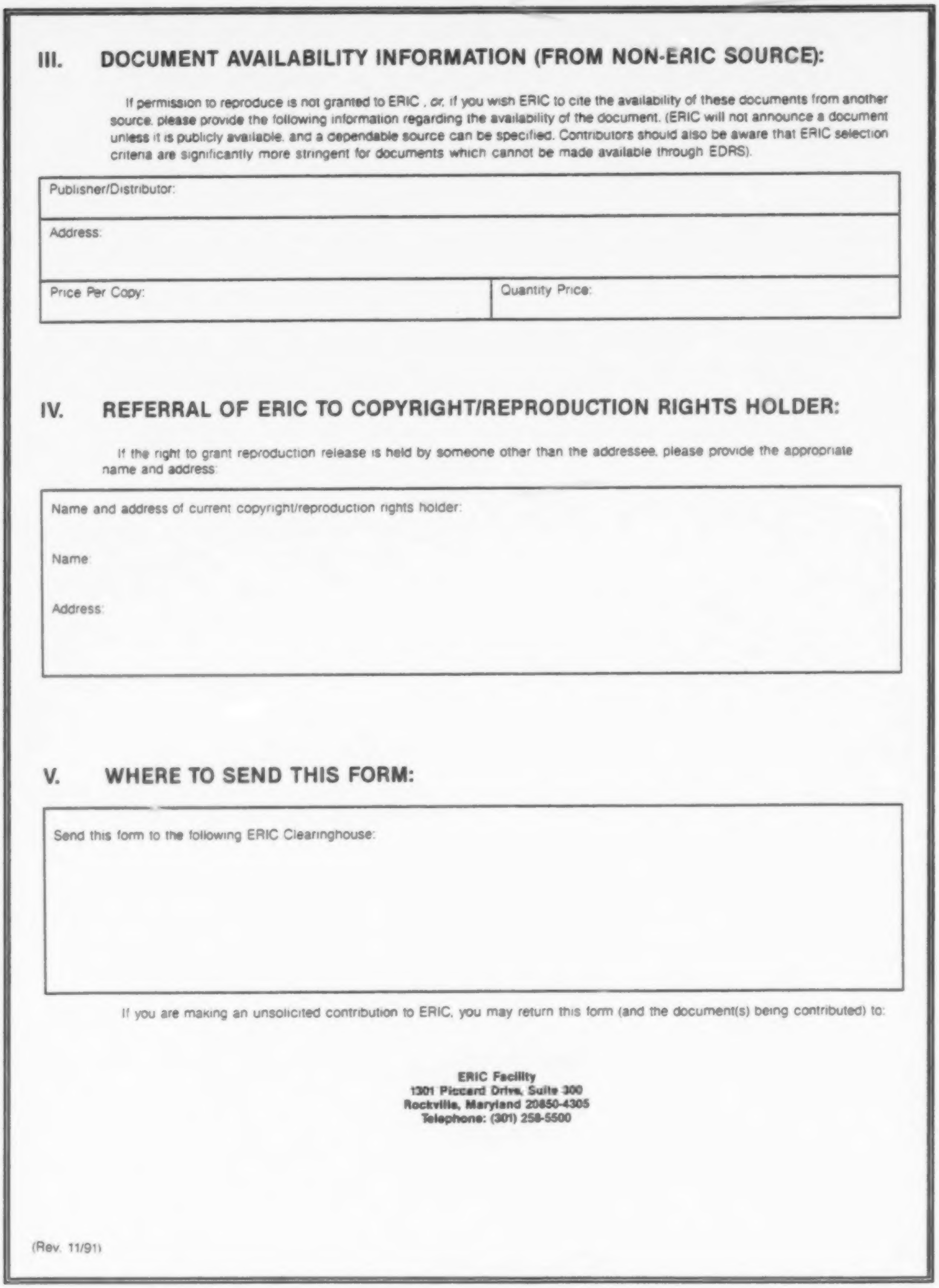
Signature:	Position:
Printed Name:	Organization:
Address:	Telephone Number: ( )
	Date:

FIGURE 10: **Reproduction Release Form**
B. Blanket Release (Page 1 of 2)



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Address:

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Rockville, Maryland 20850-4305
Telephone: (301) 258-5500

(Rev. 11/91)

FIGURE 10: **Reproduction Release Form**
B. Blanket Release (Page 2 of 2)

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"PERMISSION TO REPRODUCE THIS
MATERIAL HAS BEEN GRANTED BY

____

____

TO THE EDUCATIONAL RESOURCES
INFORMATION CENTER (ERIC)."

FIGURE 11: **Reproduction Release Labels**
A. **Level 1 (Paper Copy, Microfiche, and Other Media)**

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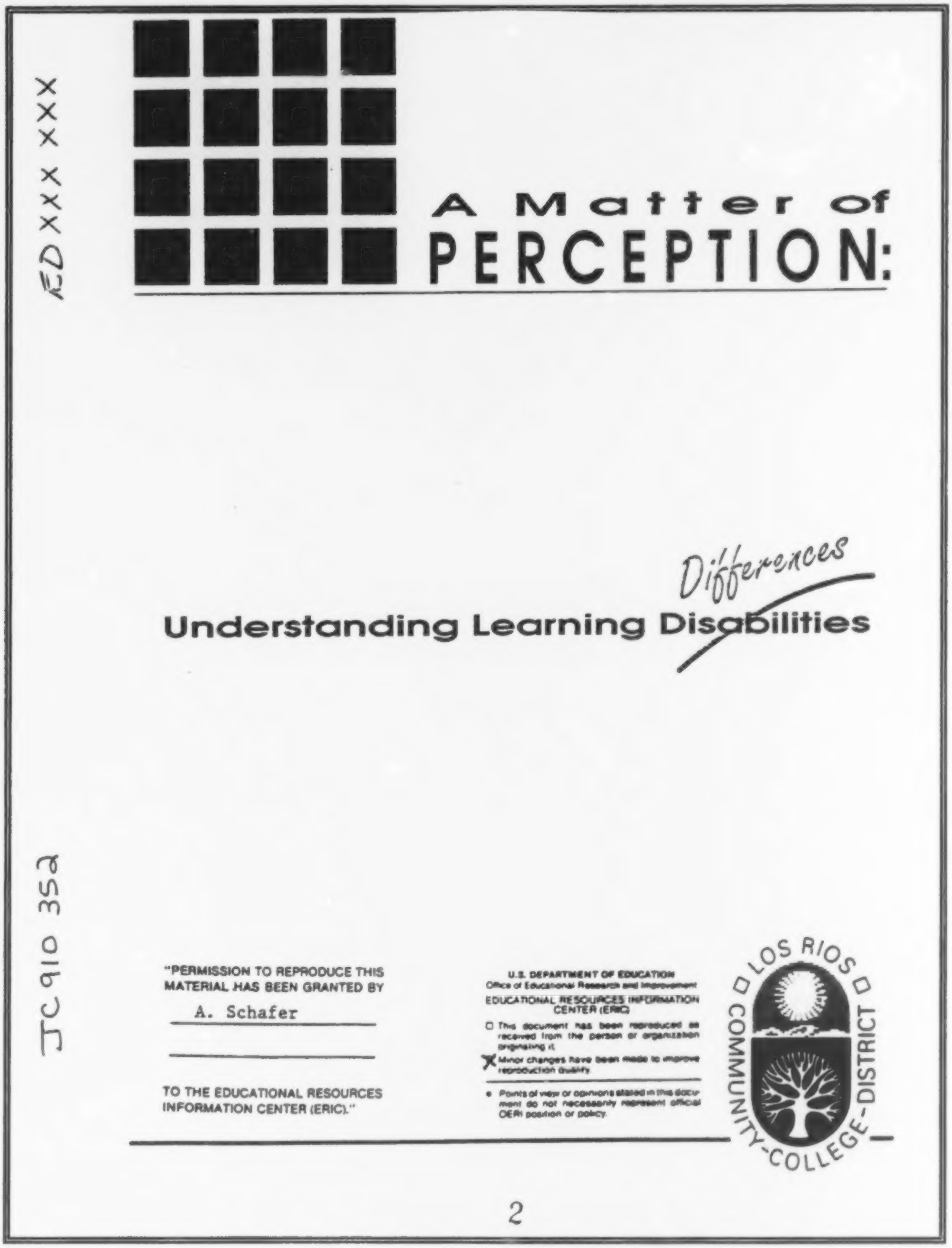
IN **OTHER THAN PAPER COPY** HAS BEEN
GRANTED BY

____

____

TO THE EDUCATIONAL RESOURCES
INFORMATION CENTER (ERIC)."

FIGURE 11: **Reproduction Release Labels**
B. **Level 2 (Other than Paper Copy)**



ED XXX XXX

A Matter of
PERCEPTION:

Understanding Learning ~~Disabilities~~ Differences

JC 910 352

"PERMISSION TO REPRODUCE THIS
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LOS RIOS COMMUNITY-COLLEGE-DISTRICT

2

FIGURE 12: Sample Document Cover/Title Page
(showing all Labels to be affixed and accession numbers to be added)

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All labels (disclaimer and/or reproduction) must be affixed to the cover (or first sheet to be filmed) of the document (see **Figure IV-12**). This ensures that the labels will appear prominently on the first frame of the microfiche. The labels may be affixed in any blank space of the document except the upper left corner (reserved for ED number) or the lower left corner (reserved for the CH number). The labels should never cover text and should not be placed perpendicular to the text. If no space is available for the stickers, a new first page should be prepared that includes the title of the document, the CH number, and the labels.

Gummed labels are available upon request from the ERIC Facility Document Control Department.

h. Reply Cards (Acknowledgments to Contributors)

The Facility uses Reply Cards (see **Figure IV-5**) to advise document contributors who wish to be informed of the disposition (and ED number) of their documents. When the Clearinghouses receive documents from the Facility with Reply Cards attached to them, they should only detach and mail the self-addressed card if the document is rejected (citing the reason for rejection is optional). If the document is selected for RIE, the card should simply be left on the document. The Facility will mail the card to the contributor, after the ED number has been assigned and recorded on the card.

Clearinghouses may make use of similar cards, if they wish, by affixing them to the inside covers of the documents. The cards should be fully addressed (for universities and colleges this should include the academic department), postage supplied, and the title supplied on the back with room for the insertion of the ED Number. Staple the card to the *inside* lower right corner of the document cover (i.e., the card will be just behind the first page to be filmed). Cards stapled on the outside are too easily torn off during shipment or later handling. The Facility will handle such Clearinghouse-affixed cards in the same way that it handles its own.

> **NOTE:** Clearinghouses should refer to the *ERIC Acquisitions Arrangements List* (EAA) list for information as to whom Reply Cards should be addressed for specific organizations. Care should be taken *not* to send automatically such routine "thank you" notes to inappropriate sources, e.g., a state Governor's office, Secretary of the Department of Education, etc.

i. PRIORITY Document Handling (By Clearinghouses)

(1) Routine Documents

Most documents received at the Clearinghouses from the ERIC Facility are not accompanied by any special forms and are ROUTINE, meaning that they can be treated like any other documents that arrive as candidates for RIE.

(2) Department of Education Documents

Documents prepared by the U.S. Department of Education are identified by a special form attached to their covers (see **Figure IV-4**). These documents should be "put at the head of the line" and should take precedence over other routine documents awaiting processing. Department of Education documents are *usually* selected for the database; if one is rejected, the same form should be used to justify the rejection and to return the document to the ERIC Facility for review by Central ERIC.

(3) PRIORITY Documents

A few documents are classified (usually by Central ERIC) as PRIORITY. The PRIORITY Form (see **Figure IV-3**) should be left attached to the document throughout processing, to ensure its continued quick handling at all stages. All regular processing steps are observed, but are expedited. The form indicates the issue of RIE in which the document should be included and the date by which the document/data must be returned to the Facility. Usually this is the very next issue still open for accessions. The speed that is necessary in processing is determined by the Facility from the RIE Master Schedule, copies of which are sent to each Clearinghouse at the beginning of the year. Normally this will involve returning the document to the Facility in the next working week following receipt; however, in some cases, even faster turnaround may be necessary to make the deadline. If for any reason, this specified schedule cannot be met, the Clearinghouse should notify the Facility immediately.

When the PRIORITY document is shipped to the Facility, *it must be mailed separately with a separate Log Sheet*, and not intermixed with routine documents. (See **Figure IV-6B**.)

From time to time, Clearinghouses may have their own PRIORITY documents that they wish to expedite by moving the document up to the next issue of RIE still open to accessions. Clearinghouse requests for PRIORITY processing should be very selective. If in doubt about issue deadline dates, the Clearinghouse should contact the Facility Editorial Department. When such a document is processed, it should also be shipped separately on a separate Log Sheet with a notice plainly identifying the document as requiring PRIORITY handling by the Facility.

j. Clearinghouse Accession Numbers

Since the final and permanent ED accession number is assigned late in the processing cycle (in order to avoid gaps in the sequence), it becomes necessary to generate a preliminary accession number in order to identify each document while it is in-process and still only a candidate for the database.

The time at which a Clearinghouse assigns a Clearinghouse Accession Number varies somewhat from Clearinghouse to Clearinghouse, but all must have a number assigned when the document is entered into the ADR.

Each Clearinghouse in the ERIC system is identified by a two-letter alpha prefix, e.g., CE, FL, UD, etc. (see **Figure I-4** or **Figure IV-14** for a complete list). This prefix, together with a six-digit number, forms a preliminary Clearinghouse Accession Number. Up to the time they are announced in RIE, all documents (and associated paperwork) are identified and referred to by this number. Since RIE announcements are grouped by Clearinghouse, this number becomes, in effect, the "sort key" for each RIE issue.

Each Clearinghouse must maintain a log to keep track of the numbers it has assigned and to avoid assigning the same number twice. Clearinghouses do not have to use every number in sequence. Numbers may be skipped or used out of sequence if necessary. However, numbers must not be "wasted" because there are only a finite number per Clearinghouse (999,999) in the present scheme. When assigned to a document, the Clearinghouse Accession Number should be stamped or written neatly and clearly in the lower left hand corner of the document cover (or first sheet to be filmed). Use black or dark blue ink; do not use pencil.

Documents consisting of several separate parts or volumes which can be processed at the same time should be arranged in proper sequence and then assigned consecutive Clearinghouse numbers (e.g. Vol. 1 (IR 101209); Vol. 2 (IR 101210), Vol. 3 (IR 101211), etc.) in order to keep them together throughout processing and subsequent announcement.

Each issue of RIE contains a "Clearinghouse Number to ED Number Cross-Reference List" for that issue. In addition, the Facility sends all ERIC components a monthly cumulated update of this listing for the current year. Annual cumulations are also prepared.

ERIC Clearinghouse Accession Numbers can be used for ordering documents from EDRS because they easily convert to ED numbers.

k. Scope Overlap Label (Figure IV-2)

When the Facility obtains a document whose subject matter overlaps the scope of two or more Clearinghouses, it must decide which Clearinghouse best seems to match the major thrust and emphasis of the document. The document is assigned for processing to this "prime" Clearinghouse. However, affixed to the cover is a label that informs the prime Clearinghouse of the other Clearinghouses that may feel they have a claim on the document. Reproduced copies of the title page bearing the label are sent by the Facility to these "alternative" Clearinghouses. In this way, the alternative Clearinghouses are informed of a document that deals with their subject area and that they may even be in the midst of requesting or processing. If they question the assignment decision, they can call the "prime" Clearinghouse and negotiate the matter. The Clearinghouse actually receiving the document is likewise alerted that it should take into account the retrieval viewpoints of the other Clearinghouses during the indexing process. The *ERIC Clearinghouse Scope of Interest Guide* (Appendix A) is the principal tool used in determining these viewpoints.

2. Miscellaneous

a. Complimentary Microfiche (to Contributors)

Each month the Facility sends to each Clearinghouse the segment of that month's ERIC microfiche collection that was input by that Clearinghouse. These microfiche must be sent to authors or contributors as a complimentary "thank you" for submitting their documents to ERIC. Clearinghouses should refer to the *ERIC Acquisitions Arrangements List* (EAA) list to determine to whom or to what organizational unit the microfiche should be sent. The text of the letter or note accompanying the microfiche to the contributors is at the discretion of the Clearinghouses, but can often serve to promote further acquisitions. This practice is *mandatory*.

b. Acquisitions Data Report (ADR)

Because of the decentralized nature of the ERIC system, it is necessary to devise some way for each of the Clearinghouses to be able to check on which documents are being processed at any given time by the other Clearinghouses. The differing subject specializations of each Clearinghouse are not sufficient to avoid potential duplicate effort. Document topics may overlap Clearinghouses, and it is not unusual for two or more Clearinghouses to feel equally justified in processing a given document.

The *Acquisitions Data Report* (ADR) is a composite file of titles for all documents currently in process at the Clearinghouses. It provides a means for identifying duplicates amongst current materials. It is accessible in two forms: (1) an online file located on a microcomputer at the ERIC Facility (this file contains a year's worth of data); (2) a printed version produced every month (this product contains a six-month running cumulation of the in-process titles.)

The procedures for inputting data to the ADR and for using it to detect duplicates are covered in EPM Section III: "Acquisitions."

c. Retention of Second Copies of Documents

If second copies of documents exist, they should generally be retained by the Clearinghouse until the first copy has been filmed, because sometimes the second copy may be used for page replacement, etc.

Documents which are at Level 3 (and not shipped for filming) should also generally be retained at the Clearinghouse at least until the issue in which they are to appear has been produced, in case questions arise about the document during editing at the Facility.

D. SHIPPING

The following procedures cover the logging, packing, wrapping, labeling, and shipping of materials from the ERIC Clearinghouses to the ERIC Facility and from the Facility to the Clearinghouses and other components of the system.

1. Clearinghouse Shipments to the Facility

a. Documents and Log Sheets

The principal materials sent from the Clearinghouses to the Facility are the documents intended for RIE announcement and Log Sheets for each shipment.

Clearinghouses should group in one package the documents and Log Sheets. Because Level 3 documents are not filmed by EDRS and are not sent to the Facility, the reproduced copies of the Title Page, Contents Page (if one exists), and any other relevant front matter containing information used in the resume for such accessions, must be sent to provide the Facility editors with documentation to check against. Level 3 backup material should be included in proper sequence in the regular shipments of Level 1 and Level 2 material.

b. Vocabulary Development Forms (VDFs)

Vocabulary Development Forms (VDFs) for any new Descriptor or proposed modification to the *Thesaurus* should be sent to the Facility marked "Attention: Lexicographer."

c. ERIC Clearinghouse Publications, Digests, Newsletters, Etc.

In addition to RIE-related material, the Clearinghouses must send the Facility (Attn: Reference Librarian) one copy of every ERIC Clearinghouse Publication, Digest, newsletter, or other publication, for inclusion in the archival collection of ERIC Clearinghouse products maintained by the Facility. (This copy should not be confused with copies required for RIE and/or EDO entries.)

d. Clearinghouse Input to the *ERIC Administrative Bulletin* (EAB)

Each month, Clearinghouses are asked to send any news item or announcements for the *ERIC Administrative Bulletin* to their contract Monitors. This information is reviewed by Central ERIC and forwarded to the ERIC Facility for inclusion in the EAB.

2. Facility Shipments to Clearinghouses

The Facility distributes a wide variety of materials to the Clearinghouses:

a. Documents acquired through the Facility's Acquisitions Program and assigned to the Clearinghouses as candidates for the database.

b. Reproduced title pages of documents overlapping the scope of two or more Clearinghouses and bearing a Scope Overlap label.

c. Duplicates, rejects, and other types of documents removed from a Clearinghouse's RIE shipment for one reason or another.

d. Vocabulary Status Reports, showing lexicographic action on VDF's.

e. Labels necessary for the processing of documents, including:

- Reproduction Release Labels (Level 1 and Level 2) (EFF-62 and 63)
- OERI Policy Disclaimer Labels (EFF-61)

f. Forms

- Vocabulary Development Form (EFF-73)
- Clearinghouse Accession Log Sheets (EFF-38)
- Acquisitions Data Report-Input Form (EFF-15)
- Reproduction Release Forms (Individual, Blanket) (EFF-53 and 57)
- Document Transfer Form (EFF-70)

g. Support Publications

- *Title Index*
- *Acquisitions Data Report* (ADR)
- *Thesaurus* (Working Copy)
- *Source Directory*
- *Clearinghouse Number to ED Number Cross-Reference List*
- *ERIC Acquisitions Arrangements List*
- *Identifier Authority List* (IAL)

h. Brochures

- *Submitting Documents to ERIC*
- RIE and CIJE Subscription Blanks

i. Single-Frame Resumes to Clearinghouses

j. Miscellaneous Distributions

- RIE (Complimentary)
- CIJE (Complimentary)
- *ERIC Clearinghouse Publications* (annual bibliography)
- *ERIC Processing Manual* (EPM) (Revisions)
- *ERIC Administrative Bulletin* (EAB)
- Complimentary ERIC microfiche (for authors/contributors)

Supplies of forms, labels, and brochures should be requested in specific quantities from the Facility's Document Control Department.

The frequency and number of copies of support publications is determined by Central ERIC. For information on the number of copies distributed to Clearinghouses and/or frequency of distribution, contact the Document Control Department.

3. Clearinghouse Accession Log Sheet Instructions

Every shipment of documents/resumes for RIE from the Clearinghouses to the Facility must be accompanied by a completed "Clearinghouse Accession Log Sheet" (**Figure IV-6**). Entries must be made in accession number sequence and the documents must be packed in the same sequence as logged. Clearinghouses must complete all parts of the form:

- Clearinghouse Name;
- Date Documents Shipped;

- Date Bibliographic Data Transmitted;
- Online Dataset Name;

- Approval Signature;
- Total Items in this entire shipment, and for each accession
  - Clearinghouse Accession Number;
  - Brief Identification (Usually author surname, sometimes title);
  - Level (i.e., 1, 2, or 3)
  - Any Special Comments (Justification for brief document, IAP, etc.)

If only one Log Sheet is required for the shipment, indicate Page 1 of 1. If more than one is required, indicate the sheet number and the total sheets, e.g., Page 1 of 3, Page 2 of 3, Page 3 of 3. If more than one box is required for the shipment, the Log Sheets should be included in the first box and the boxes marked (e.g., 1 of 3, 2 of 3, etc.).

Upon receipt at the Facility, the shipment and Log Sheet are checked against one another. If both are correct, the documents go forward for pagination. Copies of the Log Sheets are retained at the Facility for about three months for use in resolving discrepancies.

The Log Sheet may be computer-generated by the Clearinghouse provided that the form truly emulates the printed Log Sheet and has type dark enough to be reproduced clearly on an office photocopier.

4. Shipping Instructions

a. Packing

Containers or boxes used for shipping should conform to USPS regulations. The following limitations on the dimensions and weight of packages are advisable:

Dimensions:	Not over 100 inches (length plus girth)
Weight:	Seventy (70) pounds maximum

Containers should be strong enough to withstand normal handling. They should be water resistant to the extent that rain, spillage, and other such frequent occurrences will not damage the contents or undo the package. Tightly packed documents are their own best protection, so each container should be tightly packed, without using individual wrappings or envelopes on the documents. Empty space which cannot be avoided can be most economically filled with tightly packed crumpled newspaper. The box used should not be overly large, but appropriately sized for the shipment. It is best if documents are packed to prevent shifting while in transit.

As much as possible, retain the device used by the author to secure the document—spiral, flat binder, etc. Always use staples in lieu of paper clips. Large three-ring vinyl binders may be removed and the document rubberbanded provided that any data on the binder's cover is photocopied and included with the document.

b. Wrapping

Wrapping should be accomplished in accordance with U.S. Postal Service requirements. Paper packing tape should be used to seal the package adequately and avoid openings and interstices where other pieces of mail might lodge. Cellulose tape, wax, or other sealers should be avoided wherever postmark impressions are made (e.g., stamp area, flap intersections in the case of registered mail, etc.). If string or twine are used, they should be strong enough to do the job.

c. Labeling and Addressing

All packages must bear the complete names and addresses, including Zip Codes, of both sender and addressees. For the latest addresses of all network components, see the *ERIC Network Directory*. Labels should be securely affixed. Pre-printed labels may be used for consistency and convenience.

In the case of RIE material being shipped from a Clearinghouse to the Facility, the designation "ERIC MATERIAL" should appear on the label and on the left-hand corner of the labeled side of the package. If the shipment is composed of more than one box, each box should be marked to designate the proper sequence (e.g., 1 of 3, 2 of 3, 3 of 3). Because boxes can on occasion come apart in the mail, the sender's address should be included somewhere within the box, as well as on the outside.

d. Shipping Method

RIE materials shipped from the Clearinghouses to the Facility via the U.S. Postal Service should be sent CERTIFIED mail unless otherwise directed, to facilitate any necessary tracing later. Commercial delivery services (such as United Parcel Service) may be used as long as the route involved is regularly served by the company. If a commercial service is used, the mode of transportation and handling most equivalent to CERTIFIED mail should be used.

e. Shipping Schedules

Schedules for shipping documents acquired for RIE are established by the Facility and approved by Central ERIC. The RIE Master Schedule is distributed annually by the ERIC Facility. The current Clearinghouse practice is to ship to the Facility every Friday, the documents corresponding to whatever resumes have been completed and transmitted online during the week. The Clearinghouses should make every effort to ship weekly in order to shorten the elapsed time between acquisition and announcement and to keep the workflow even throughout the system. There are occasionally extenuating circumstances which will prevent weekly shipment; however, under normal circumstances, weekly shipment is strongly encouraged. If the Facility fails to receive a shipment from a Clearinghouse for two weeks in succession, however, it contacts the Clearinghouse to determine the cause of the abstentions.

f. Miscellaneous

(1) EDRS Disposition of Original Documents

EDRS converts the paper copy document originals into microfiche. From November 1966 through the April 1972 issue of RIE the microfiche were prepared according to the then 60-frame standard. After that date, ERIC microfiche were prepared according to the COSATI 98-frame standard. On-demand paper copy reproduction is done from the microfiche. The original paper copy documents (with their bindings removed) are retained for four-months in case a defect in filming is discovered requiring that the document be refilmed. After the four-month period, all Department of Education prepared or sponsored documents are removed from the set and sent to the U.S. Government Printing Office for inclusion in GPO's *Monthly Catalog of U.S. Government Publications*. The remaining documents are discarded.

NOTE: Because of increased vendor interest in products involving the full-text of ERIC documents, the original ERIC documents, beginning with the January 1990 issue of RIE, have temporarily been retained in storage at EDRS, in the event that they should be needed for scanning.

E. CIJE Input

1. Handling

The success of CIJE depends largely on quick announcement. To achieve this objective, the processing of the articles in a particular journal and the transmission of the completed resumes to the Facility should take place as rapidly as possible. Three weeks is considered the *maximum acceptable elapsed time* under normal circumstances.

Consistent with this schedule is rapid follow-up on late-arriving issues. However, since publication schedules are often erratic, e.g., many educational journals cease publication during the summer months, such follow-up should be done with advance knowledge of the particular journal's publishing pattern.

Each Clearinghouse is responsible for keeping the necessary serial records in order to ensure that all issues of a given journal for which they have responsibility are received and processed. If the records are adequate they will also prevent double processing. Responsibility for the duplicate checking of "one-shot" articles rests with the CIJE Publisher.

Articles selected for announcement in CIJE are accessioned using a unique identifying number, with alphabetic prefixes already established for each Clearinghouse (see **Figure IV-14**).

Each Clearinghouse is responsible for keeping appropriate log records to prevent the use of any given Clearinghouse Accession Number more than once.

2. Shipping

CIJE resumes are transmitted electronically to the ERIC Facility (and from there to the CIJE Publisher after some computerized checking).

Clearinghouse Accession Log Sheets (EFF-38) should be shipped from the Clearinghouse to the Facility on a "journal-by-journal" basis. Each journal issue processed should begin a new Log Sheet. This form is identical to that used for RIE input (see **Figure IV-15A**). Care should be taken to fill in the "Journal Citation (CIJE Only)" block, identifying the material as pertaining to CIJE. The sum of all the Log Sheets sent in a physical shipment should correspond to a matching electronic transmission of bibliographic data.

All shipments of CIJE Log Sheets are to be labeled "ERIC Materials" and are to be transmitted via Certified Mail, or equivalent commercial carrier service. The CIJE shipment may be included with the weekly RIE shipment, as long as it is segregated and properly marked.

NOTE: Many Clearinghouses have internal automated document handling systems that can prepare a Clearinghouse Log Sheet as a computer-printed by-product of the system. This is acceptable as long as the computer-printed form contains the same information as the printed Log Sheet.

The actual journal articles that have been cataloged, indexed, and annotated for a given transmission/shipment are *not* sent by the Clearinghouses, insofar as they are copyrighted and usually part of an entire journal issue that serves other functions at the Clearinghouse host institution.

3. Facility Handling and Shipping

The Facility's Document Control Clerk records the date of receipt and the number of items received in each shipment. The Facility matches Log Sheets with electronic transmissions and then sends the resultant magnetic tape, together with the matching Log Sheets, to the CIJE Publisher.

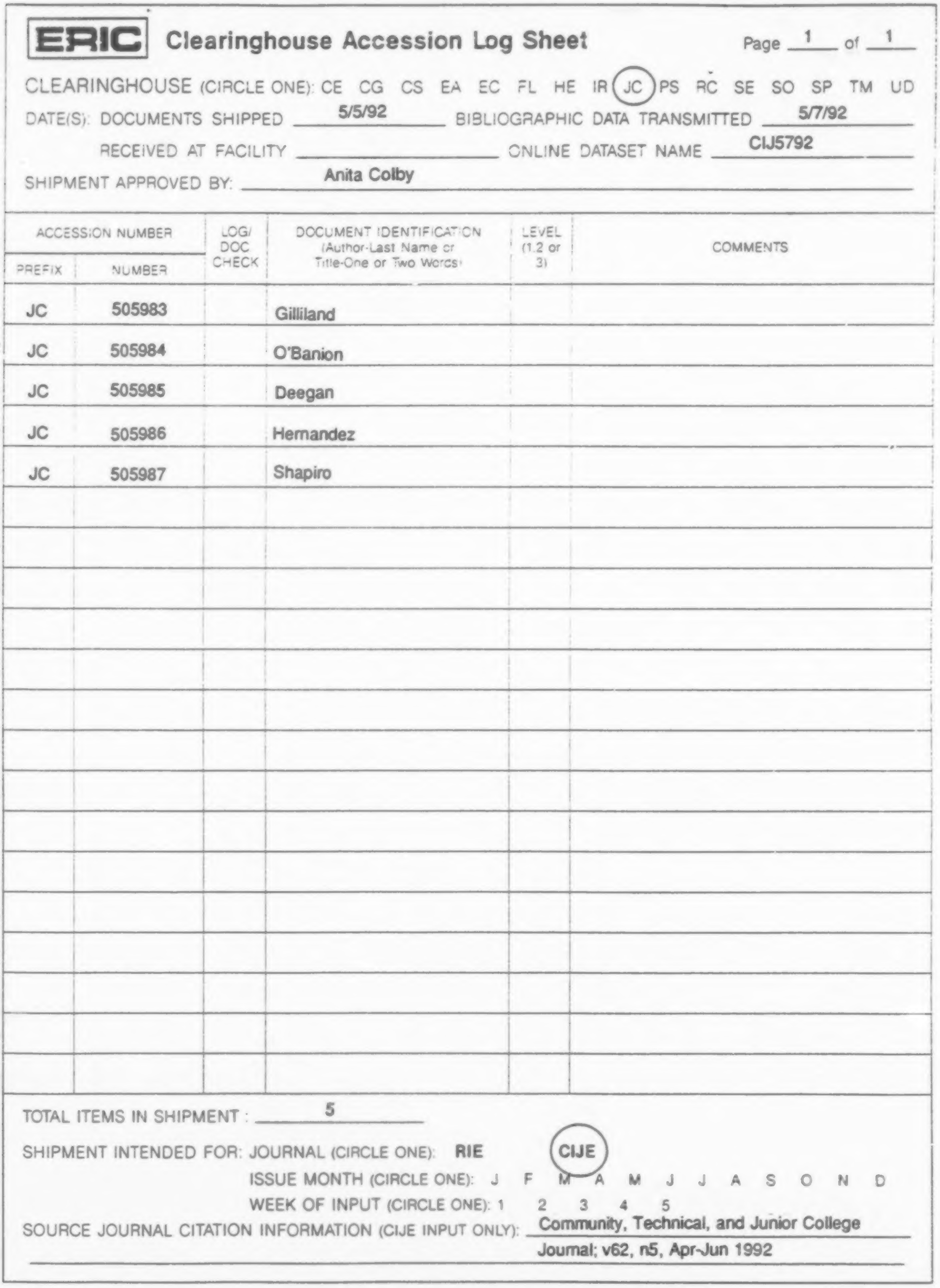
4. EJ Accession Number

The final EJ accession number is assigned to articles by the CIJE Publisher just prior to publication. It consists of the two-letter alpha prefix EJ, followed by six numerics, e.g., EJ 123 456.

ALPHA PREFIX	NUMERIC SERIES	CLEARINGHOUSE/PROCESSOR	NOTE
AA	500 000	Centralized Processing	1969-1971 ERIC Facility 1972-1982 CIJE Publisher
AC	500 000	Adult Education	Merged into CE in 1973
AL	500 000	Linguistics	Merged into FL in 1971
CE	500 000	Adult, Career, and Vocational Education *(including input of Adjunct ERIC Clearinghouse for Consumer Education, since June 1991)*	Current
CG	500 000	Counseling and Personnel Services	Current
CS	700 000	Reading and Communication Skills	Current
EA	500 000	Educational Management	Current
EC	500 000	Handicapped and Gifted Children	Current
EF	500 000	Educational Facilities	Merged into EA in 1970
EM	500 000	Educational Media and Technology	Merged into IR in 1974
FL	500 000	Languages and Linguistics *(including input of Adjunct ERIC Clearinghouse on Literacy Education for Limited-English-Proficient Adults, since September 1989)*	Current
HE	500 000	Higher Education	Current
IR	500 000	Information Resources	Current
JC	500 000	Junior Colleges	Current
LI	500 000	Library and Information Sciences	Merged into IR in 1974
PS	500 000	Elementary and Early Childhood Education	Current
RC	500 000	Rural Education and Small Schools	Current
RE	500 000	Reading	Merged into CS in 1972
SE	500 000	Science, Mathematics, and Environmental Education	Current
SO	500 000	Social Science/Social Studies Education *(including input of Adjunct ERIC Clearinghouse for Art Education and Adjunct ERIC Clearinghouse on United States-Japan Studies, since March 1990)*	Current
SP	500 000	Teacher Education	Current
TE	200 000 700 000	Teaching of English	Merged into CS in 1972
TM	500 000	Tests, Measurement, and Evaluation	Current
UD	500 000	Urban Education	Current
VT	500 000	Vocational and Technical Education	Merged into CE in 1973

*AA = formerly encompassed all journals that could not be assigned to particular Clearinghouses.

FIGURE IV-14: Clearinghouse Accession Number Series Used for CIJE Records



ERIC Clearinghouse Accession Log Sheet

Page 1 of 1

CLEARINGHOUSE (CIRCLE ONE): CE CG CS EA EC FL HE IR [✓ JC] PS RC SE SO SP TM UD

DATE(S): DOCUMENTS SHIPPED 5/5/92 BIBLIOGRAPHIC DATA TRANSMITTED 5/7/92

RECEIVED AT FACILITY ______ ONLINE DATASET NAME CIJ5792

SHIPMENT APPROVED BY: Anita Colby

	ACCESSION NUMBER		LOG/ DOC CHECK	DOCUMENT IDENTIFICATION (Author-Last Name or Title-One or Two Words)	LEVEL (1,2 or 3)	COMMENTS
	PREFIX	NUMBER				
1	JC	505983		Gilliland		
2	JC	505984		O'Banion		
3	JC	505985		Deegan		
4	JC	505986		Hernandez		
5	JC	505987		Shapiro		
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

TOTAL ITEMS IN SHIPMENT : 5

SHIPMENT INTENDED FOR: JOURNAL (CIRCLE ONE): RIE [✓ CIJE]

ISSUE MONTH (CIRCLE ONE): J F M A M J J A S O N D

WEEK OF INPUT (CIRCLE ONE): 1 2 3 4 5

SOURCE JOURNAL CITATION INFORMATION (CIJE INPUT ONLY): Community, Technical, and Junior College Journal; v62, n5, Apr-Jun 1992

EFF-38 (6/90)

FIGURE IV-15: Clearinghouse Accession Log Sheet
A. CIJE Input

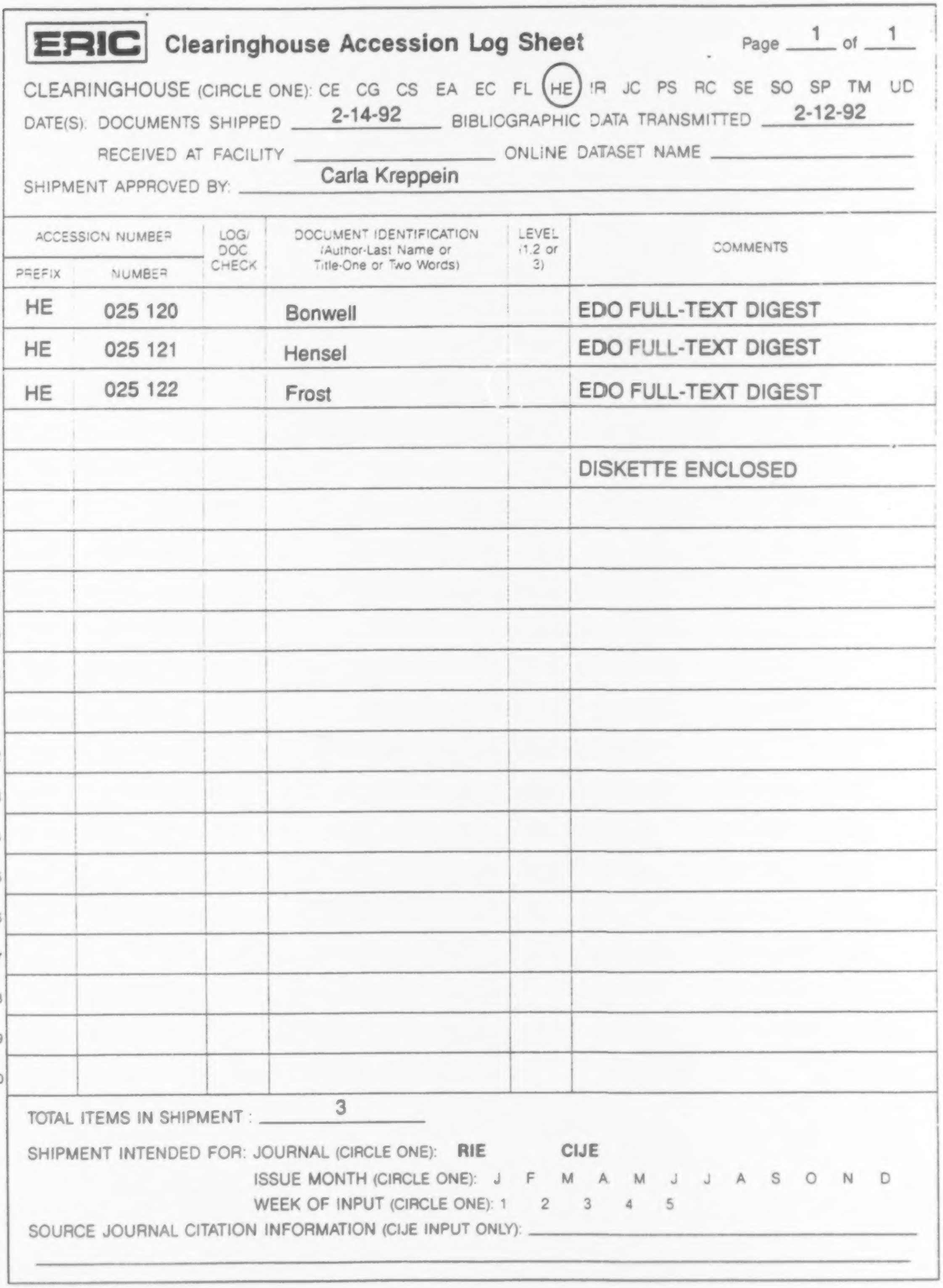
F. ERIC Digests Online (EDO) Full-Text Input

ERIC Digests must be routinely input to the ERIC database and announced in RIE under an ED#. In addition to this regular shipment of printed Digests and resumes describing them for the database, it is required that the full-text of all current Digests be provided to the Facility by Clearinghouses for the ERIC Digests Online (EDO) file. The transmission of the full text of ERIC Digests should take place at the same time as input of the Digest resume for RIE.

When the Clearinghouse transmits the Digest full-text records, the corresponding printed Digest copies should be shipped the same week. The printed version is used by the Facility editors to proof the full-text to ensure that no data has been lost in transmission. Do *not* ship merely a computer printout of the raw data after conversion.

The printed version of the Digest should be prepared and shipped for the EDO file in the following manner:

- Record the CH Accession Number in the lower left corner of the Digest (in pencil), just as on regular document input.
- Attach a paper copy of the corresponding RIE bibliographic citation for the Digest; this is simply a copy of the resume as transmitted for announcement in RIE. (This helps to ensure accuracy and avoid errors.)
- Prepare a separate standard ERIC Clearinghouse Log Sheet as a "shipping list" for this Digest or group of Digests. (See **Figure-15B** for an example.)
- Enter the date of transmission of the full-text record on the Log Sheet line "Bibliographic Data Transmitted."
- In the "Comments" section of the Log Sheet, enter "Full-Text Digests"; if a diskette accompanies the shipment, add a helpful notation in the same section, e.g., "Diskette Enclosed."
- Ship the Log Sheet, Published Digest(s), and paper copy of the resume(s) to the Facility in the same week as the corresponding RIE document is shipped and/or the Digest full-text is transmitted.



ERIC Clearinghouse Accession Log Sheet

Page 1 of 1

CLEARINGHOUSE (CIRCLE ONE): CE CG CS EA EC FL [✓ HE] IR JC PS RC SE SO SP TM UD

DATE(S): DOCUMENTS SHIPPED 2-14-92 BIBLIOGRAPHIC DATA TRANSMITTED 2-12-92

RECEIVED AT FACILITY ______ ONLINE DATASET NAME ______

SHIPMENT APPROVED BY: Carla Kreppein

	ACCESSION NUMBER		LOG/ DOC CHECK	DOCUMENT IDENTIFICATION (Author-Last Name or Title-One or Two Words)	LEVEL (1,2 or 3)	COMMENTS
	PREFIX	NUMBER				
1	HE	025 120		Bonwell		EDO FULL-TEXT DIGEST
2	HE	025 121		Hensel		EDO FULL-TEXT DIGEST
3	HE	025 122		Frost		EDO FULL-TEXT DIGEST
4						
5						DISKETTE ENCLOSED
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

TOTAL ITEMS IN SHIPMENT : 3

SHIPMENT INTENDED FOR: JOURNAL (CIRCLE ONE): RIE CIJE

ISSUE MONTH (CIRCLE ONE): J F M A M J J A S O N D

WEEK OF INPUT (CIRCLE ONE): 1 2 3 4 5

SOURCE JOURNAL CITATION INFORMATION (CIJE INPUT ONLY): ______

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FIGURE IV-15: Clearinghouse Accession Log Sheet
B. ERIC Digests Online (EDO) Input

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Section V: Cataloging

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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REFERENCE TOOLS USED IN THE CATALOGING PROCESS

The publications listed alphabetically below are the primary reference tools of use in the cataloging process. The ERIC cataloging guidelines assume that Clearinghouse catalogers have both knowledge of and access to these publications (in their latest editions). Because the introductory material appearing in each publication describes fully its frequency, format, and method of use, that information is not repeated here.

Anglo-American Cataloguing Rules (AACR-2)

Clearinghouse Number to ED Number Cross-Reference List

ERIC Abstractor/Indexer Workbook

ERIC Acquisitions Arrangements List

ERIC Indexing Handbook

ERIC Processing Manual (EPM)

ERIC Tape Documentation

GPO Style Manual

Guidelines for Descriptive Cataloging of Reports (PB-86-112349)

Identifier Authority List (IAL), and Supplements

A Manual of Style (University of Chicago Press)

Source Directory
  —Truncated Edition (Names Active Across Last 5 Years)
  —Monthly Cumulative Supplements
  —Archival Edition (All Names)

Thesaurus of ERIC Descriptors (Working Copy), and Supplements

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SUMMARY OF SIGNIFICANT RULES

The following rules apply to the cataloging of all data elements. The rules that apply uniquely to specific data elements are provided in the individual section on that data element.

1. Catalog solely from the document in hand. Do not engage in extensive research to determine cataloging data. (However, if the document is Level 3, research into sources of availability may be necessary.)

2. The principal authorities that should be consulted to answer cataloging questions not covered by these guidelines are the following:

   - *Guidelines for Descriptive Cataloging of Reports. A Revision of COSATI Standard for Descriptive Cataloging of Government Scientific and Technical Reports.* (PB-86-112349)

   - *Anglo-American Cataloguing Rules.* 1988, Second edition, Revised.

3. The principal authorities that should be consulted to answer questions of grammatical style and English usage not covered by these guidelines are the following:

   - *GPO Style Manual*

   - *A Manual of Style* (University of Chicago Press)

4. Do not end lines with a hyphen, slash, or dash.

5. The text of all fields should be entered in upper and lower case, as appropriate. Use only the 88 characters available in the ERIC Character Set. The underline (_) may only be used immediately after the field keyword.

6. The semicolon is used only as a subfield delimiter (to separate multiple Authors, Institutions, Descriptors, Report Numbers, etc., and to separate logical segments of certain fields, e.g., Journal name from volume/number data) in all fields except the Title, Descriptive Note, Availability, and Abstract textual fields, where it can be used as a normal punctuation mark.

7. Certain data elements are mandatory and others are optional (i.e., conditional on their appearance in the document or journal article). Mandatory data elements must be cataloged for every record entered in the system.

8. Different volumes in a series or parts of the same document should be accessioned in proper sequence and, if at all possible, should be processed in the same issue of RIE.

V. CATALOGING

A. Introduction

1. General

These guidelines for descriptive cataloging are intended for use by the ERIC Clearinghouses in preparing bibliographic data for the ERIC database. They will also be of interest to users of the ERIC database in that they describe various matters, the knowledge of which is essential to retrieval operations (e.g., the definition of each data element, the location of certain information in the record, the structure of the data).

Cataloging is a complex function, and the guidelines presented here are necessarily limited. For cataloging problems not detailed herein, catalogers should consult the following principal references (on which the ERIC guidelines were based):

- *Guidelines for Descriptive Cataloging of Reports. A Revision of COSATI Standard for Descriptive Cataloging of Government Scientific and Technical Reports. Washington, D.C., Commerce, Energy, NASA, Defense Information (CENDI) Cataloging Committee.* 1985. 80p. (PB-86-112349).

- *Anglo-American Cataloguing Rules.* Second Edition, Revised. Chicago, American Library Association, 1988. 677p.

For questions of general grammatical style and English usage, the cataloger should consult principally the latest editions of the *GPO Style Manual* and the University of Chicago Press' *A Manual of Style.*

The objective of descriptive cataloging is to provide a unique description for the document in hand so as to distinguish it from all other documents. Since ERIC is a computerized system, the cataloging function simultaneously provides tags for the data the system collects. These tags later serve essential roles in various computerized operations such as the production of indexes, generation of abstract journals, and computer searching.

While at first glance the detail provided in Section V may seem daunting to individuals new to cataloging, it is based on real documents and actual ERIC experience. Section V should be used in conjunction with several other Sections of this Manual. Information in Section V is provided for all data elements comprising an ERIC "resume" (i.e., cataloging, indexing, and abstract); however, the primary emphasis is on the bibliographic data (e.g., Author, Title). Although indexing (Descriptors and Identifiers) is briefly covered in Section V, Section VII and VIII-1 & 2 should be consulted for detailed information on indexing and the use of Descriptors and Identifiers. Section VI should be consulted for detail on the preparation of Abstracts/Annotations. Preparation of the data for submission to the database after the records have been cataloged is covered in Section IX, Data Entry.

Traditional library cataloging deals primarily with monographs (books) and serials (journals)—the standard literature of the commercial publishing community. ERIC cataloging deals primarily with curriculum guides, technical/research reports, government reports, contractor reports, commission reports, dissertations, hearings, conference proceedings, conference papers, and similar fugitive, limited-distribution, noncommercial materials. The ERIC data elements have been selected to fit the literature processed by

ERIC and they, therefore, include elements that are not normally treated by libraries, e.g., Report Numbers, Contract Numbers, Sponsoring Agencies, etc. The ERIC cataloging guidelines were originally based on guidelines developed specifically for the report literature. Just as the database evolved over the first twenty-five years of its existence to include not only report literature but curriculum guides, conference papers, etc., so too have the cataloging guidelines.

ERIC catalogers need to keep in mind that descriptive cataloging is essentially simply an organized way of supplying information about any given document or journal article. Basically, cataloging can be regarded as providing answers to a series of questions; these "answers" are then recorded in pre-established formats in assigned locations.

2. Principles of ERIC Cataloging

Because of the complexity and variety of the literature covered by the database, the most fundamental rule of ERIC cataloging is to catalog from the document in hand. Extensive investigation to find information not contained in the document, sometimes justified in the cataloging done by large research libraries, has rarely been seen as justified for the literature entering the database.

Information that may accompany the document (e.g., letters of transmittal) should, of course, be used if available and kept with the document for the benefit of later editors. Also, if a document is obviously one of a series, of which other members have been entered in the system, it is appropriate to check the other members to ensure consistent treatment within the set. However, in general, the rule is to catalog from the document and to consider each field of data as a distinct entity, attempting to characterize that particular aspect of the document as best it can be on the basis of the information immediately available.

A second fundamental principle of ERIC cataloging is that it is sometimes necessary to take a common sense and/or creative approach to catalog a document properly. No amount of rules, guidelines, or examples in this Section can possibly cover every kind of document or material likely to be encountered by an ERIC cataloger. This is especially true when the "document" is in fact a group of documents entered as one item (e.g., a collection of newsletters, a compendium of curriculum materials, a packet of assorted handout material). Many of the documents entering the ERIC database were written either for immediate classroom or other use or for a limited audience; such documents frequently do not provide the bibliographic information typically found in commercial publications. If such information is provided, it may not be in the standard locations such as the cover, the title page, verso of title page, etc. The document also may not have a "standard" layout with easily identifiable titles, authors, sources, etc.

Concomitant with the need for creativity in applying the rules of cataloging is the third principle: pertinent and/or prominently displayed information in the document generally should be accounted for either in the bibliographic data or in the abstract. Prominently displayed information should not be ignored even if it does not immediately lend itself to an appropriate data element. For example, a statement on a document "prepared by the faculty committee to develop guidelines for dealing with violence in schools" cannot be cataloged in the Personal Author field, and a faculty committee normally would not be created as an institutional source because such committees are of short duration; however, the information should still be captured, e.g., in the Descriptive Note or the Abstract.

3. Relationship of EPM Guidelines/Rules to Data in Online, Print, or CD-ROM Versions of the Database

The guidelines/rules described in Section V were created in order to standardize cataloging across the network's Clearinghouses (regular and adjunct). While at times it will be helpful to catalogers to refer to an online, printed, or CD-ROM version of the database to determine how earlier entries or comparable entries for a particular document or document type have been cataloged, these versions have been "massaged" to a certain extent by vendors and will be at variance to the EPM. Some examples of these variations are: some online and/or CD-ROM versions of the database have altered the Publication Date by dropping any reference to the month and day and adding the century (i.e., "19"); RIE displays the pagination as part of the Note field, uses commas instead of semicolons to separate terms in the Descriptor field, and does not display some fields such as Governmental Status. Regardless of what is found in these different vendor versions, catalogers should follow the guidelines in the EPM.

4. Definitions

- **Resume**

A resume is a complete surrogate record for a document or journal article. A complete record consists of the descriptive bibliographic data (title, pagination, author, etc.), indexing data, and an abstract/annotation describing the item in succinct narrative form. (**Figures V-1A-B** display completed RIE and CIJE resumes.) All new resumes submitted by the ERIC Clearinghouses are identified initially by the Clearinghouse Accession Number. The computer system considers a resume to consist of all fields following the identifying Clearinghouse Accession Number (CH_) and preceding the next CH_. Descriptive cataloging, as discussed in Section V, results in a completed RIE or CIJE resume.

- **Data Element/Field**

Within these resumes are elements of data called "fields" (e.g., title, author, contract number, abstract, etc.). The concepts "data element" and "field" are used interchangeably throughout Section V.

An ERIC resume may have up to 24 possible data fields, although not all fields are used by the Clearinghouses nor would all fields be appropriate for any given resume. Each field within a resume is identified by its own unique keyword. A keyword is the "tag" that indicates the beginning of a new field. Each keyword is entered in all capital letters followed by an underscore (_). Fields, their keywords, and an indication of whether the content of the field is provided by an ERIC Clearinghouse or the ERIC Facility are listed in **Figure V-3**.

```
CH_CE123456
PDAT_May92
LEVEL_1
AUTH_Butler, Kathleen; Smith, B. James
TITLE_Career Planning for Women.
INST_BBB35000=Central Univ., Chicago, IL. Center for Research in Women's
Education.
SPON_EDD00036=Office of Educational Research and Improvement (ED),
Washington, DC.
AUD_Policymakers
CONT_RI900000
REPNO_ISBN-0-3333-5568-1; OERI-91-34
PUBTYPE_141; 160
LANG_English; Spanish
GEO_U.S.; Illinois
GOV_Federal
JNL_Women Today; v13 n3 p1-14 Jan 1992
NOTE_An abridged version of this report was presented at the National
Conference on Educational Opportunities for Women (9th, Chicago, IL, May
14-16, 1992).
AVAIL_Campus Bookstore, 123 College Ave., Chicago IL 60690 ($5.95).
DESC_Career Guidance; *Career Planning; *Demand Occupations; *Employed
Women; *Employment Opportunities; Females; Labor Force; Labor Market;
Postsecondary Education
IDEN_Consortium of States; *National Occupational Competency Testing
Institute
ABST_Women's opportunities for employment will be directly related to their
level of skill and experience and also to the labor market demands through
the remainder of the decade. The number of workers needed for all major
occupational categories is expected to increase by about one-fifth between
1990-1999, but the growth rate will vary by occupational group.
Professional and technical workers are expected to have the highest
predicted rates (39 percent), followed by service workers (35 percent),
clerical workers (26 percent), sales workers (24 percent), craft workers
and supervisors (26 percent), managers and administrators (15 percent), and
operatives (11 percent). This publication contains a brief discussion and
employment information (in English and in Spanish) concerning occupations
for professional and technical workers, managers and administrators,
skilled trades, sales workers, clerical workers, and service workers. In
order for women to take advantage of increased labor market demands,
employer attitudes toward working women need to change and women must: (1)
receive better career planning and counseling; (2) change their career
aspirations; and (3) fully utilize the sources of legal protection and
assistance that are available to them. (Contains 45 references.) (SB)
```

FIGURE V-1A: Completed RIE Resume[1]

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[1] This resume displays all possible fields a Clearinghouse could use in cataloging a document. No resume is likely to exhibit all possible fields.

```
CH_CE523456
AUTH_Swanson, Jane L.
TITLE_The Structure of Vocational Interests for African-American College
Students.
PUBTYPE_143
LANG_English; Spanish
NOTE_Special theme issue on "Holland's Theory."
AVAIL_UMI
JNL_Journal of Vocational Behavior; v40 n2 p144-57 Apr 1992
DESC_*Vocational Interests; *College Students; *Black Students; Higher
Education; Geometric Constructions; *Validity; Sex Difference
IDEN_*African Americans; Hollands Hexagonal Model; Strong Interest
Inventory; Gender Scales (Johnson)
ABST_Describes a study in which the Strong Interest Inventory was completed
by 189 female and 168 male African-American college students (20%
response). Correlations among the General Occupational Theme scales
supported the potential applicability of Holland's theory to African
Americans, but highlighted gender differences. (SK)
```

FIGURE V-1B: Completed CIJE Resume[2]

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[2] This entry illustrates a resume (fictitious) as it would be prepared by an ERIC Clearinghouse; thus the data elements later added by the CIJE Publisher or the ERIC Facility have not been included.

- **Subfield**

Certain fields may be subdivided into subfields, i.e., multiple instances of the same type of data or logical subdivisions of the data. For example, the Personal Author field may be subdivided into two personal authors. The fields which may be subdivided are:

AUD; AUTH; CONT; DESC; GEO; IDEN; INST; JNL; LANG;
PUBTYPE; REPNO; SPON

NOTE: Subfields within a field are always separated or "delimited" by a semicolon followed by a blank.

5. Mandatory vs. Optional Data Elements

Certain data elements are mandatory, and records are not permitted to enter the ERIC Master Files unless they exhibit these data elements. Other data elements are "optional" or "conditional" in that they are not always available on the document, but they should be cataloged when available. There are some differences between RIE and CIJE in this regard. For example, the Title field is mandatory for both RIE and CIJE, but the Journal Citation field is mandatory solely for CIJE.

Figure V-2 lists all of the mandatory data elements and indicates for each whether it is an RIE or CIJE element.

Data Elements Mandatory for RIE	**Data Elements Mandatory for CIJE**
Clearinghouse Accession Number	Clearinghouse Accession Number
Publication Date	Publication Date
Level of Availability (at EDRS)	
Pagination	
Title	Title
Publication Type	Publication Type
Language	Language
Geographic Source	
Descriptors	Descriptors
Abstract	
	Journal Citation

FIGURE V-2: List of Mandatory Data Elements

6. Clearinghouse Input vs. ERIC Facility (or CIJE Publisher) Input

Most of the cataloging data is generated by the Clearinghouses and reviewed and edited by the ERIC Facility (or CIJE Publisher). However, of the 24 total data elements currently cataloged, four are the responsibility of the central support contractors for RIE (Facility) and CIJE:

- ERIC Accession Number (ED/EJ Number)
- Issue (of Abstract Journal)
- EDRS Price Code (RIE only)
- Pagination (Level 1 and 2 Documents only) (RIE only)

Figure V-3, which is a total list of the data elements along with their keywords, includes these four and designates the responsible unit in each case.

7. Data Elements No Longer in Use

The discussion in Section V.B covers individually all active data elements. The three data elements no longer used by ERIC that have data in their fields in older records on the ERIC master file are Program Area, Project Number, and Grant Number. These elements are briefly described in Section V, Attachment 1.

8. Processing/Cataloging Specific Document Types

One of the ongoing concerns of Clearinghouse processors is the necessity to pull together all of the information typically required to process and catalog specific types of documents. To this end, Attachment 2 "Processing/Cataloging Specific Document Types" has been added to Section V. Initially, Attachment 2 will contain only guidelines for entering analytics to the database. It is projected that other document types will gradually be added to Attachment 2 and that Clearinghouses will customize their own copies of the EPM to include the requirements for document types that they regularly process.

		RESPONSIBILITY		RIE		CIJE	
		CH	FAC	Mandatory	Optional	Mandatory	Optional
1 ACC	ERIC Accession No.(ED/EJ)		X	X		X	
2 ISS	Issue of Abstract Journal		X	X		X	
3 PRICE	EDRS Price[3]		X	X			
4 PAGE	Pagination[4]						
A	Level 1 & 2 Documents		X	X			
B	Level 3 Documents	X		X			
5 CH	Clearinghouse Accession No.	X		X		X	
6 PDAT	Publication Date	X		X		X[6]	
7 LEVEL	Level of Availability at EDRS	X		X			
8 TITLE	Title	X		X		X	
9 JNL	Journal Citation	X			X	X	
10 LANG	Language	X		X[5]		X	
11 PUBTYPE	Publication Type	X		X		X[7]	
12 DESC	Descriptors	X		X		X	
13 GEO	Geographic Source	X		X			
14 ABST							
A	Abstract	X		X			
B	Annotation	X					X
15 AUTH	Personal Author	X			X		X
16 INST	Institution	X			X		
17 SPON	Sponsoring Agency	X			X		
18 REPNO	Report Number	X			X		X[8]
19 CONT	Contract Number	X			X		
20 NOTE	Descriptive Note	X			X		X
21 AVAIL	Availability	X			X		X[9]
22 GOV	Governmental Status	X			X		
23 AUD	Target Audience	X			X		X
24 IDEN	Identifiers	X			X		X

FIGURE V-3: ERIC Data Elements (Showing Responsibility for Each Element, Keyword, File in Which Used, and Mandatory/Optional Status)

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[3] EDRS Price Code - Generated by computer, based on data in Level and Pagination fields.

[4] Pagination - Clearinghouses provide pagination for Level 3 documents (where no actual document is sent to the Facility); Facility paginates all Level 1 & 2 documents.

[5] "English" is automatically computer-generated in both RIE and CIJE when Language field is not present in incoming records.

[6] Computer-generated from last component (i.e., year) in Journal Citation field.

[7] Publication Type 080 -- Journal Article inserted automatically by computer in all CIJE records.

[8] ISSN Number must be recorded for "oneshot" journal articles.

[9] Availability (CIJE) - "UMI" expanded by computer in printed CIJE to "Reprint: UMI."

B. Data Elements

The following descriptions, of each data element/field, are arranged alphabetically by the keyword of that data element (e.g., **ABST** for Abstract/Annotation, **ACC** for ERIC Accession Number, etc.). A standard format consisting of five parts has been established for describing each data element: Profile, Typical Entry, Narrative Text, Summary of Significant Rules, and Examples. (See **Figure V-4**.)

The ERIC Character Set referred to in the Profile is displayed in **Figure V-5**. This Figure lists only those characters which may be used in ERIC data fields. As indicated in the Profile, in some instances the field is restricted to specific characters (e.g., the Language field may contain only alphabetic characters, the Descriptor field may contain only alphabetic and two special characters—semicolon and parentheses).

Profile

Data Element/Field	- Language
Data Entry Tag/Keyword	- LANG_
Files	- RIE/CIJE
Mandatory/Optional	- Mandatory (If left blank, the computer inserts English)
Data Provided By	- Clearinghouse
Character Set	- Alphabetic
Subfields Permitted	- Yes (up to 5)
Field Length	- 46 (Max.); 7 (Avg.)
Field ID No. (Tape)	- 76

The Profile provides a quick capsule of basic information about the data element:

- its official name (e.g., Language);
- the tag/keyword used during data entry to identify the data to the computer program (e.g., LANG__);
- the files (RIE and/or CIJE) in which the field is used (e.g., RIE/CIJE);
- whether the field is mandatory or optional (e.g., Mandatory);
- which component provides the data—Clearinghouse, ERIC Facility, or the CIJE Publisher (e.g., Clearinghouse);
- what characters from the ERIC Character Set (alphabetic, numeric, and special) (e.g., Alphabetic);
- whether or not the field can have more than one subfield [e.g., Yes (up to 5)];
- field length (maximum size permitted and average size) [e.g., "46 (Max.); 7 (Avg.)"]; and
- field identification number (decimal) used on computer tape, i.e., master file of the database (e.g., 76).

A Typical Entry is provided showing an example of the data element as it should be cataloged (e.g., LANG_English; Spanish).

A Narrative Text follows which provides detailed information concerning how the data element should be cataloged. All explanations and justifications that can only be handled by a narrative are provided here.

A Summary of Significant Rules explicit or implicit in the text are succinctly itemized in list form.

Examples are provided for all the significant variant forms the data element can take. Each form is labeled. This portion of the discussion is designed for rapid ready reference. In many cases, a cataloger faced with a problem, can solve that problem by referring to an example without reading the text explaining or justifying the approach.

FIGURE V-4: Sample Data Element Description

ALL ALPHABETICS — A-Z (UPPER CASE)
all alphabetics — a-z (LOWER CASE)
NUMERICS — 0-9
SPECIAL CHARACTERS — (LISTED BELOW)

&	AMPERSAND
'	APOSTROPHE
*	ASTERISK
	BLANK SPACE
[	BRACKET (LEFT)
]	BRACKET (RIGHT)
:	COLON
,	COMMA
--	DASH (TWO HYPHENS)
$	DOLLAR SIGN
=	EQUALS
!	EXCLAMATION POINT
>	GREATER THAN
<	LESS THAN
-	HYPHEN
(	PARENTHESIS (LEFT)
)	PARENTHESIS (RIGHT)
%	PERCENT
.	PERIOD
+	PLUS SIGN
#	POUND SIGN
?	QUESTION MARK
"	QUOTATION MARK
;	SEMICOLON
/	SLASH, VIRGULE

FIGURE V-5: ERIC Character Set

B.1 ABSTRACT/ANNOTATION

Profile

Data Element/Field	- Abstract/Annotation
Data Entry Tag/Keyword	- ABST_
Files	- RIE/CIJE
Mandatory/Optional	- Mandatory (RIE); Optional (CIJE)
Data Provided By	- Clearinghouse
Character Set	- Alphabetic, Numeric, Special
Subfields Permitted	- No
Field Length	- RIE - 3,500 (Max.); 1,099 (Avg.) CIJE - 720 (Max.); 273 (Avg.)
Field ID No. (Tape)	- 44

TYPICAL ENTRY (RIE)[10]

ABST_Negative preconceptions about the disadvantaged often hinder the effectiveness of teachers and administrators in schools in culturally depressed areas. Most disadvantaged children are not hostile or unresponsive, nor do they need special discipline. They and their parents often have high, even unrealistic, educational aspirations...Teachers should encourage in the children the self-discipline that leads to academic success, which, in turn, would break the self-fulfilling prophecies of failure. (AA)

TYPICAL ENTRY (CIJE)

ABST_Discusses the characteristics of written composition that can be applied to successful speech communication. (HTH)

An abstract/annotation is a brief narrative description of a document without interpretation or criticism. Detailed guidelines and rules for the creation of abstracts/annotations are provided in Section VI of this Manual and, thus, are not reiterated here. The Summary of Significant Rules for Abstracts which follows therefore relates to the preparation of the field as part of the resume and to the kinds of data that should not be in the Abstract/Annotation.

Abstracts for RIE are preferably of the Informative type, in which the abstract actually contains some of the information transmitted by the document and stands as a small scale substitute for the entire document. Certain kinds of documents require Indicative abstracts, in which the abstract serves as a Table of Contents, telling the user what may be found in the document, but without substantive detail. Mixed Informative/Indicative abstracts are permitted in selected situations.

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[10] The typical abstract in RIE is approximately 200 words. The ellipses used in this example indicate the abstract was shortened for illustration only. Ellipses are normally not used in abstracts.

Abstracts are normally limited to approximately 200 words; however, in certain situations (e.g., conference proceedings, machine-readable data files, etc.) that limit is extended to approximately 300 words, and in extreme situations, may approach 400 words.

Annotations for CIJE journal articles are not mandatory, but are strongly recommended and should always be prepared whenever the title does not adequately explain the contents of the item; such situations are illustrated in the following examples:

Title Explains the Contents:

"What Kind of Academic Background Does an Elementary Teacher Need To Teach Social Studies?"

Annotation not absolutely needed, but typically would be created to augment the title.

Title Does Not Explain the Contents:

"How Far Did Paul Revere Ride?"

Annotation added: Illustrates improving map study by relating an unfamiliar location to the geographical area where the student lives...

Annotations are rarely omitted in CIJE as they usually can provide additional useful information. Annotations are limited to approximately 50 words and may not exceed 60 words (a "word" being defined as any data found between two spaces).

SUMMARY OF SIGNIFICANT RULES

1. Abstracts for RIE documents are to be of the Informative type, whenever the document type permits, and are normally limited to approximately 200 words.

2. Table-of-Contents type Indicative Abstracts are normally limited to approximately 300 words, but in certain extreme situations may approach 400 words (e.g., proceedings of large conferences, machine-readable data files, etc.).

3. Annotations for CIJE journal articles are normally limited to approximately 50 words and may not exceed 60 words.

4. Do not use hyphens, dashes, or slashes at the end of a line. The computer system assumes a space is appropriate after every word ending a line.

5. All of the characters in the ERIC Character Set may be used in the Abstract.

6. Do not use the underline, superscripts, subscripts, or italics. Quotation marks may be used as substitutes for underlining or italics. Superscripts and subscripts must be changed to linear equivalents, e.g.,

10^5	10 to the fifth power.
L_{10}	L sub ten.
5^2	5 squared.

7. Use only one blank space after all punctuation.

8. Non-abstract data (data which is cataloged elsewhere in the resume) should not also be in the Abstract. Specifically, the following kinds of information should not be in the Abstract:

   - Related document references (use Note field).
   - Marginal legibility notes (use Note field).
   - Preparing Institution or Sponsoring Agency information (use Institution and/or Sponsoring Agency field).
   - Complete repetition of the Title (use Title field); some words from the Title may be needed in order to introduce the topic, but avoid complete repetition.

9. In general, do not use abbreviations (e.g., for state names) in the Abstract. However, acronyms, once defined at their initial appearance in the record, may later be used by themselves.

10. Use double parentheses when enumerating a list of items, e.g.: (1)_______; (2)_____; (3)_______.

11. Use the following format to list titles and authors:

    "Teaching Reading Skills" (Jennifer Samuels); "Language Skills of the Limited English Proficient Student" (John Rodriguez and Linda O'Hara).

    When space allows, retain authors' complete names; do not abbreviate unnecessarily. To conserve space in extra long abstracts the first names may be omitted. Do not use a format such as: "Teaching Reading Skills" by Jennifer Samuels, etc.

12. When doing a list of chapters or papers in an Indicative abstract, take particular care with author names. Authors do not like to have their names misspelled.

13. At the end of the abstract place the initials of the abstractor in parentheses, e.g., "(JB)". If an author abstract is used, place the word "(Author)" in parentheses at the end of the abstract. If an author abstract is used in modified form, use a combination of the two elements, "(Author/JC)."

14. Punctuation in the Abstract should be in accordance with the normal rules of English usage. The semicolon does not function in this field as a subfield delimiter.

15. Author abstracts should be used if they are judged adequate to convey the content of the item. Author abstracts will not and need not comply with exactly the same standards that an ERIC abstractor, writing a completely new abstract, should follow.

16. Even if the abstract is created by a Clearinghouse abstractor, the abstract should make use of the author's own words and phrases whenever possible.

EXAMPLES

See Section VI (Abstracting) for examples of how abstracts should be structured.

B.2 ERIC ACCESSION NUMBER

Profile	
Data Element/Field	- ERIC Accession Number
Data Entry Tag/Keyword	- ACC_
Files	- Mandatory
Mandatory/Optional	- RIE/CIJE
Data Provided By	- Computer Generated
Character Set	- Alphabetic, Numeric
Subfields Permitted	- No
Field Length	- 8 Fixed Length
Field ID No. (Tape)	- 16

TYPICAL ENTRY (RIE)	ACC_ED123456
TYPICAL ENTRY (CIJE)	ACC_EJ123456

The ERIC Accession Number (ED or EJ) is computer-assigned during final processing at the ERIC Facility (or at the CIJE Publisher) and only after all duplicates, rejects, and other removals have been made. This ensures a desirable unbroken, "gapless" sequence of accession numbers in the final product.

For this reason, this field should be left blank on all resumes transmitted by Clearinghouses to the ERIC Facility.[11]

The ERIC Accession Number serves several purposes:

- an address tag for computer storage and retrieval;
- a physical location address for shelf storage of documents and microfiche;
- an index-to-resume connector for use in the indexes of announcement media;
- an order number for acquiring microfiche or paper copies of documents from EDRS (ED-only) or reprints from UMI (EJ-only).

The Accession Number prefix for RIE is an "ED," standing for "ERIC Document." The Accession Number prefix for CIJE is an "EJ," standing for "ERIC Journal."

A complete list of all ERIC Accession Numbers assigned to date, organized by publication by month, appears as Appendix D in the *ERIC Tape Documentation*.

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[11] The keyword is used manually by the Facility during backfile corrections whenever a record must be purged after the publication of an issue (e.g., a duplicate). The field may be used also by Clearinghouses whenever they provide the full-text of an ERIC Digest with an existing ED number.

SUMMARY OF SIGNIFICANT RULES

1. The ERIC Accession Number is assigned to the document or journal article by the computer at the ERIC Facility (or CIJE publisher) as one of the last steps in computer processing and after all duplicates, rejects, and other removals have been made. This ensures a desirable "gapless" sequence of numbers. This number is not assigned by the Clearinghouses.

2. The ERIC Accession Number is entered in the computer file in packed form (e.g., "ED123456"). However, the customary way of printing the number for good readability is: "ED 123 456" (as used in RIE citations) or "ED-123456" (as often used in bibliographies).

3. RIE Accession Numbers are prefixed with an "ED." CIJE Accession Numbers are prefixed with an "EJ."

4. ED Accession Numbers are assigned sequentially and without gaps. If, after publication, a given accession is found to be a duplicate of a prior accession, or if a valid request is made to withdraw the accession from circulation, the record is not completely expunged from the file, but is instead "skeletonized" to a record containing only title and explanatory note (**see EPM, Section X**).

B.3 AUDIENCE

Profile

Data Element/Field	- Target Audience
Data Entry Tag/Keyword	- AUD_
Files	- RIE/CIJE
Mandatory/Optional	- Optional
Data Provided By	- Clearinghouse
Character Set	- Alphabetic
Subfields Permitted	- Yes
Field Length	- 80 (Max.); 21 (Avg.)
Field ID No. (Tape)	- 51

TYPICAL ENTRY AUD_Administrators

a. General

The Target Audience data element is intended to identify the segment of the *educational community* (or related public) for which the document has been written and at which it is directed. In creating a document, authors or preparing institutions frequently (but not always) have in mind an intended audience that they hope will use the document. It is the purpose of this data element to identify this audience and to record it in such a way that searchers may, if they desire, limit their search output to material directed at specific audiences.

The key to assigning this data element is the word "educational." The field is used for documents directed to certain types of individuals in the *educational community*. While the database's content relates to any and all aspects of education and its peripheral areas, not all documents in ERIC have a specific education audience. Some were produced instead for a larger audience or for other specific audiences, but may be of interest to the educational community. Some examples of such documents are:

- Material issued by a government agency for the general public—e.g., how to establish credit, how to file a tax form, how to prevent AIDS, etc.;
- Reports from a government agency to the legislature—e.g., funding for housing, census statistics, employment statistics, etc. (containing education-related data). Documents such as these may be of use to educators, but unless it is specifically stated in the document that the audience is individuals such as teachers, students, etc., the Audience field should not be cataloged.

Various "educational audiences" have been identified. These audiences represent those segments of the educational community (and related public) that can be distinguished from one another in a practical way. Other segments exist, but have not been selected for a variety of reasons:

- they are too small and specialized;
- they overlap too much with one another and would therefore create decision problems;
- they are not sufficiently well-defined or do not have an agreed-upon identity;
- documents are not written specifically for such groups in any quantities, etc.

EDUCATIONAL
COMMUNITY

- Policymakers
- Researchers
- Practitioners
  - Administrators
  - Teachers
  - Counselors
  - Media Staff
  - Support Staff
- Students

SUBGROUPS OF
GENERIC
"PRACTITIONERS"
CATEGORY"

EXTERNAL
GROUPS

- Parents
- Community

FIGURE V-6: Audience Authority List

The eleven audience types in the Authority List in **Figure V-6** are more fully defined in **Figure V-7** by the provision of examples of the types of jobs/staff that would fall in each category.

The key guideline to note in applying this data element is that "Target Audience" implies that someone has selected a target to "aim" at. That "someone" is the document preparer (author or institution). The cataloger should not speculate on who *might* be interested in the document, or who *ought* to read it, or who the cataloger would *like* to see read it, or who *could* get something out of it. Applying this data element in a subjective way would not permit the necessary consistent application by the many ERIC catalogers involved.

It is essential, therefore, that the Target Audience decision be based objectively on what the document says and what can be determined unambiguously by examination of the document and its characteristics, i.e., the decision should be based on hard evidence. This is not a mandatory data element and should not be cataloged unless it can be cataloged easily and without mental reservation.

Figure V-7A displays the various audience types and provides guidance to the cataloger by defining each audience in terms of the types of staff/jobs that would make up each category. Further, **Figure V-7B** provides examples of the types of documents that would tend to be directed at each audience. Please notice the use of the word "tend." The decision as to Target Audience is essentially independent of all other data elements, including Publication Type. For example, a bibliography cannot be said to be targeted for any particular audience simply by virtue of being a bibliography. To be assigned a Target Audience, a bibliography must state for whom or for what objective it was prepared.

The major Target Audience, "Practitioners," as the largest single audience encountered, has been subdivided into five specific types of practitioner, for greater utility to the user/searcher. The cataloger may use the generic term "Practitioners" to indicate the audience or may use any of the sub-categories. If three or more practitioner sub-categories are used for a given document, the cataloger should simply assign the generic term "Practitioners" by itself.

In order to facilitate the limitation of search output by the large "Practitioners" category, whenever a cataloger employs one of the practitioner sub-categories, the ERIC computer system automatically adds the generic term "Practitioners" to the field. In other words, it is not necessary for the cataloger to write the term "Practitioners" if one of the practitioner sub-categories is being used.

(1) Use of the Generic Term "Practitioner"

If a clearly practitioner-oriented document fails to say explicitly (or via evidence) which particular practitioners are being addressed, then it is generally better to simply use the generic term "Practitioner" than it is to "force" a finer classification, e.g., via process of elimination.

(2) Education-Based Practitioner

Practitioners, in ERIC, are not defined solely as those that are formally school-based, since educational practitioners may perform their functions in non-school-based situations, e.g., Indian reservations. A practitioner may well be correctly targeted by a document describing a function (e.g., teaching, counseling, media work, etc.) taking place outside a formal "school" setting. The entire practitioner group is education-based, but not necessarily school-based.

b. Primary Targets and Secondary Targets

Primary target groups should, of course, be cataloged. Secondary targets should be reviewed critically and used sparingly. A research report that is basically intended for researchers, but that concludes its technical discussion by detailing the extensive implications of the research findings for working counselors, is probably legitimately cataloged as for "Researchers; Counselors". However, a teacher manual that contains ideas for a teacher to use in the classroom should probably be restricted to "Teachers", even though some of the material consists of actual problems to be solved by students. The reasoning here is that the document itself is intended for teacher use and would reside on the teacher's desk no matter what the teacher might choose to extract from it for student use.

FIGURE V-7A: Audience Type Defined by Types of Staff/Jobs

	EDUCATIONAL COMMUNITY								EXTERNAL GROUPS	
MAJOR GROUPS	POLICY-MAKERS*	RESEARCHERS	PRACTITIONERS*					STUDENTS	PARENTS	COMMUNITY
SUB-GROUPS			ADMINISTRATORS*	TEACHERS	COUNSELORS*	MEDIA STAFF	SUPPORT STAFF*			
TYPES OF STAFF IN EACH AUDIENCE	Boards of Education Education Commissions/Committees Legislators Regulators School Boards Trustees	Analysts Evaluators Experimenters Research Managers Researchers Statisticians Surveyors Test Construction Specialists	Administrators Business Office Staff College/University Presidents Commissioners Consultants/Advisors Coordinators County Staff Curriculum Specialists Deans District Staff Financial Staff LEA Staff Legal Staff Planners Principals SEA Staff Superintendents Supervisors	Camp Staff Coaches Day Care Staff Inservice Teachers Instructional Personnel Part-time Teachers Preservice Teachers Professors Remedial Teachers Special Ed. Staff Student Teachers Substitute Teachers Teacher Aides Teacher Associations/Unions Teacher Educators Teachers Teaching Interns Tutors Vocational Education Staff	Career Assistance Staff College Placement Staff Counselors Guidance Staff Psychologists (Functioning as Advisors, e.g., on Social Adjustment, etc.) Student Advisors	Audiovisual Staff Diffusion/Dissemination Specialists Information System/Center Staff Librarians Media Center Staff	Athletics (non-teachers) Buildings & Grounds Food Services, e.g., Cooks, Dietitians, Nutritionists Health Services, e.g., Physicians, Nurses, Therapists Psychologists (Functioning as Mental Health Monitors), Psychiatrists, etc. Secretaries Transportation Staff Volunteers	Learners Pupils Scholars Students	Foster Parents Parents PTA Groups Single Parents	Church Leaders Clergy Community Groups Employers Industrial/Commercial Organizations Local Business-People Neighborhood Groups

* The word "Education" or "Educational" should be understood to be in front of each of these terms, e.g., "Educational Administrators."

FIGURE V-7B: Audience Type Defined by Examples of Types of Documents

	EDUCATIONAL COMMUNITY								EXTERNAL GROUPS	
MAJOR GROUPS	POLICY-MAKERS*	RESEARCHERS	PRACTITIONERS*					STUDENTS	PARENTS	COMMUNITY
SUB-GROUPS			ADMINIS-TRATORS*	TEACHERS	COUNSELORS*	MEDIA STAFF	SUPPORT STAFF*			
TYPES OF DOCUMENTS *COMMONLY* (BUT NOT ALWAYS) DIRECTED AT EACH AUDIENCE	Assessments of Educational Progress Feasibility Studies National Commission Reports	Conference Presentations (Researchers Talking to Researchers) Research Reports Research Summaries Statistical Compilations	Administrator Guides Conference Presentations (Administrators Talking to Administrators) Contracts Fact Sheets Forms Guides for Evaluating School Programs Personnel Staff Handbooks Laws Policies Regulations	Annotated Bibliographies Conference Presentations (Teachers to Teachers) Curriculum Materials Guides for Selecting Instructional Materials Instructional Materials Learning Activity Packages Lesson Plans Promising Practices Resource Materials Tests Units of Study	Career Guidance Materials College Related Information Directories Forms Reference Works Tests	A-V Materials Bulletin Board Materials Dictionaries Directories Fact Sheets Graphs Illustrations Library Manuals Micrographic Materials Mixed Media Pictorials Posters Reference Works Resource Materials	Building Plans Facilities Materials Health-Related Materials Maintenance Schedules Nutrition/ Meal-Related Materials	Background Readings Games Puzzles Resource Materials Study Suggestions Textbooks Worksheets	Assessment of Educational Progress Fund Raising Materials Guides for the Public Public Relations Materials	

* The word "Education" or "Educational" should be understood to be in front of each of these terms, e.g., "Educational Administrators."

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c. What Kind of Document Is Targeted for Researchers?

The following factors can be considered "evidence" that a document is research-oriented: (1) amount of material devoted to directions for further research; (2) amount of experimental and statistical data presented (that could only be checked by other researchers); (3) degree of technicality of material presented (that could only be comprehended by other researchers); (4) forum in which presented, e.g., annual conference of professional society (researchers talking to researchers).

d. Overlap Between Audiences

It is easy to imagine some overlap between the audiences, e.g., the administrator who is allowed to set policy, the teacher who becomes temporarily a student, etc. For the purposes of this scheme, however, it is necessary to assume that the groups are relatively "pure," i.e., Policymakers set policy, Administrators administer school systems, etc. The classifier should not blur the essential distinctions between these groups, even though real life situations may well do so.

e. Historical Background

This data element, in its fully defined form, was added to the ERIC database beginning with the January 1984 issue of *Resources in Education* (RIE). During the last quarter of 1982 (November-December issues of RIE), as part of a pilot project investigating a specialized document-based "Practice File," the terms "Practitioners" or "Students" were added to this field for all regular input documents whose Target Audience was explicitly stated as Practitioners or Students. These data were distributed to all the major online vendors as part of their regular monthly update tapes. In addition, this same "Practice File" pilot project retrospectively reviewed RIE data (for the period January 1979 through October 1983) and added these same two target audience terms to all appropriate accessions identified in this nearly five-year period.

Searchers should note that in any given record during the five-year period 1979-1983, the Target Audience field contains the terms "Practitioners" or "Students," but will not contain any other audience terms. Beginning with 1984, the Target Audience field may contain any of the various terms described in this section. Use of this data element in a computer search will automatically exclude all material entering the ERIC database prior to 1979 and will severely limit the output during the period 1979-1983.

SUMMARY OF SIGNIFICANT RULES

1. The Target Audience, if one exists, is decided upon by the author or institution creating the document and is either explicitly stated or clearly implied by evidence in the document itself. In other words, the Target Audience should be an obvious and unambiguous characteristic of the document, similar to its publication date or pagination. It is not intended to be a matter of speculation or guesswork by the cataloger or indexer. If the Target Audience is not stated explicitly or is not obvious, then it should not be cataloged.

2. If a document has a target audience, it will usually have only one. However, a document may have more than one Target Audience, e.g., Teachers and Students, Administrators and Parents, etc. There is no restriction on the number of Target Audiences that may be cataloged as long as the authority list is adhered to; however, if the number of practitioner groups involved is three or more (out of the five available) then the cataloger should simply use the generic term "Practitioners."

3. The "Practitioners" category of Target Audience has five sub-categories. The cataloger may use the broad, overall tag "Practitioners" by itself or may use any combination of the sub-categories. When using the sub-categories, it is not necessary to add the more generic tag "Practitioners." The ERIC computer system will automatically add the tag "Practitioners" to any Target Audience field using one or more of the Practitioner sub-categories.

4. Target Audience is not to be decided upon solely on the basis of the Publication Type involved. For example, a bibliography cannot be said to be targeted for any particular audience simply by virtue of being a bibliography. To be assigned a Target Audience a bibliography must state for whom or for what objective it was prepared. While certain types of documents will certainly tend toward being prepared for particular audiences, the Publication Type data element should be regarded as essentially independent of the Target Audience data element. (The one exception is the 051/052 group of Publication Type codes which are by definition "Classroom Use" materials for students or teachers, respectively.)

EXAMPLES

ONE TYPE OF PRACTITIONER[12]	Counselors
TWO TYPES OF PRACTITIONERS	Administrators; Support Staff
PRACTITIONERS IN GENERAL(OR MORE THAN TWO TYPES OF PRACTITIONER)	Practitioners
SEVERAL MAJOR CATEGORIES OF TARGET AUDIENCE	Counselors; Students; Parents
NO TARGET AUDIENCE	[left blank]

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[12] The computer system will automatically add the generic term "Practitioners" to the field whenever a sub-category of Practitioner has been cataloged.

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B.4 AUTHOR

Profile

Data Element/Field	- Personal Author
Data Entry Tag/Keyword	- AUTH_
Files	- RIE/CIJE
Mandatory/Optional	- Optional
Data Provided By	- Clearinghouse
Character Set	- Alphabetic, Numeric, Special
Subfields Permitted	- Yes (Maximum of 2)
Field Length	- 100 (Max.); 23 (Avg.)
Field ID No. (Tape)	- 27

TYPICAL ENTRY

AUTH_Burns, Joan F.; Hurtz, Tim L.

a. General

The entry(ies) in this field should be the name(s) of the person(s) responsible for writing the document, performing the research, or editing/compiling the content of the document. All entries in the Personal Author field appear in the Author Indexes of RIE and CIJE.

b. Determination of Authorship

If the personal author(s) is (are) not clearly identified by a word such as "Author(s)" or "By," the entry should be determined by selecting a name(s) from the cover, title page, or elsewhere in the report, in the following order of precedence:

- Unaccompanied by any qualifying words, but by location, may be assumed to be the author(s) of the document;
- Identified as the person(s) preparing the document;
- Identified as the principal investigator(s);
- Identified as compiler(s) or editor(s);
- Identified as person(s) submitting the document.

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Unless there are other indications that the individual is, in fact, a personal author, omit the author entry if the person identified is: the project manager; the director or chair of the group doing the work; the school district superintendent; the school principal; the state school superintendent; or the government department head. For example, a superintendent whose name/title automatically appears on the cover or title page of every publication of a school system should not be interpreted as being the author of every otherwise anonymous such publication. Leave the field blank if no author is identified. Note, however, that documents will usually have either a personal author or a corporate author, or both. Documents without either are extremely rare. (For information on cataloging Corporate Author, see the discussion under "Institution" in Section V.)

Particular care should be taken before selecting names of personal authors from a list of committee/council/conference members or participants. Frequently the chairperson of a committee is the last person listed or the committee is listed in alphabetical order. In the absence of a designated chairperson who serves as editor, compiler, or senior author, the Clearinghouse cataloger should try to determine the correct person(s) to be listed (by personal contact, if necessary), or leave the field blank.

"Senior author" (i.e., usually the first author listed) is a delicate matter in academic circles. Requests to alter or rearrange the authorship sequence on a document do occur. It is advisable that the Clearinghouse make such alterations only after receiving a written request from the author(s) affected.

c. Format of Names

Cataloging of Personal Author names is based on the document in hand. The name (unless it is an obvious typographical error) should be entered as it appears on the document. Spacing, hyphenation, capitalization, etc., generally should follow what is found on the document. Spacing and capitalization of complex names with prefixes such as "de Wolf," "DuBarry," "DiAnne," should correspond with what is on the document. Hyphenated names such as "Thomas-Smith, Robert," "O'Dell-McDougall, Kathleen," generally should be entered as one surname, e.g., "Thomas-Smith, Robert."

No attempt should be made to make the author's name consistent across a series of documents, if the series does not reflect such consistency. Errors in spelling discovered after a record has been entered in RIE or CIJE will be corrected whenever reported. However, ERIC does not honor requests for name alterations resulting from marital, religious, or other reasons, to achieve consolidation of index entries under one name, etc., after the entry has appeared in RIE or CIJE.

Determining the proper format of unusual names can usually be done by consulting author listings in the footnotes or the bibliography of a document or by using the latest edition of the *Anglo-American Cataloguing Rules*. If still in doubt, contact the author(s). Nicknames should be ignored in cataloging, unless they are the only name available, e.g., William A. "Bill" Griffin, Jr. should be cataloged as:

AUTH_Griffin, William A., Jr.

However, "Stevie" Frohman should be cataloged as:

AUTH_Frohman, Stevie

Authors who occasionally use nicknames are also often found without their nickname. If the nickname were to be picked up in the one case and not in another, the same author would get in the system under two name forms. Also arguing for ignoring nicknames is the fact that the nickname is often simply a more familiar version of one of the earlier-appearing names or initials, e.g., William "Bill." As authors venture into more formal publishing realms, nicknames tend to get dropped. Ignoring nicknames, therefore, provides the best chance of keeping an author's works together under one name form.

d. **Punctuation**

Hyphens and apostrophes may be used in the Author field (e.g., O'Toole, Mary-Louise); parentheses and double quotes may not be used. Brackets "[ ]" may not be used, e.g., to indicate a supplied author's name.

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SUMMARY OF SIGNIFICANT RULES

1. Enter Personal Author names in full (to the extent available on the document), with the last name first, followed by a comma, space, the first name (or initial), space, and the middle initial (or initials, or name). If only initials are available from the document, use the two initials. Do not attempt to research a first name. Legitimate qualifiers that are regarded as part of a personal name, such as "Jr.," "II," or "III," should be set off by commas, e.g., Gould, John E., Jr.

2. Omit titles, degrees, and other honorifics. However, in the case of religious order bynames, when that is the only name available, add the vernacular title to the byname, e.g., Mary Jeremy, Sister. Omit parentheses around parts of names, e.g., "Martha (Jackson), Brown." Omit any hyphens between first and middle name initials, e.g., J.-C."

3. Omit names of translators from the Author field; instead enter such data in the Note field.

4. If the "author(s)" are identified as editor(s) or compiler(s), add a comma and the abbreviation(s), "Ed." or "Comp.," as appropriate, after each name. Do not use the plural forms "Eds." or "Comps."

5. Do not use brackets to identify supplied information or to set off editor or compiler notations.

6. No more than two author entries are currently permitted. They should be sequenced as on the document (i.e., not necessarily in alphabetic order). The first and second entries should be separated by a semicolon (;) and a space. If there are more than two (2) authors, the first entry should consist of the principal author, and the second should be "And Others" (note initial capitals).

7. If an individual is identified as "Editor and Compiler" or "Compiler and Editor," use only the first named identification; do not use both.

8. Authors are cataloged by the name appearing on the document, even if there has later been a name change or a reversion to a birth name.

9. Authors with the same last name must nevertheless be cataloged individually. The form "Jamison, Harry and Anne" is incorrect.

10. If a document is part of a series and has both an individual editor and a series editor, catalog only the editor for the individual item. (The series editor should be cataloged only if the entire series itself is cataloged.)

11. Position titles, such as "Project Director," should not accompany personal names in the Personal Author field.

12. Virtually every RIE document should have either a Personal Author or an Institution (or both). Some person or organization must be responsible for the document. However, note that CIJE has no Institution field and therefore corporate authorship of journal articles (which is rare) can only be described in the Note field. Do not enter institution names in the Personal Author field.

13. Never use "Anonymous" in the Personal Author field. If no specific name is given, leave the field blank.

14. If two names are listed on the document for the same individual, i.e. , George Thompson a/k/a Mowambe Buto or Marsha Twilly a/k/a Marsha T. Jackson, use only the first-cited name. Do not use both names.

15. If the proper format of an unusual name cannot be determined from the document itself (including footnotes, bibliography, etc.), or from contact with the author, consult the latest edition of the *Anglo-American Cataloguing Rules.*

16. Nicknames should be ignored in cataloging, unless they are the only name available. For example, William A. "Bill" Griffin, Jr. should be cataloged simply as AUTH_Griffin, William A., Jr. However, "Stevie" Frohman should be cataloged as AUTH_Frohman, Stevie.

17. Brackets "[ ]" or parentheses "( )" may not be used to indicate supplied authorship or nicknames.

18. If an author's name is presented differently in different parts of the document, use the more complete form.

19. If a name is hyphenated, treat the complete hyphenated form as the last name.

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EXAMPLES

Single Author	Smith, David Cahn-Casden, Martha Rodriguez, Roberta J. O'Donnell, T. Donald Weiser, Kathleen McCabe Johnson, Bobbie-Sue Masaka, L. T. Thompson, Matthew P., III Brown, Henry K., Jr.
Two Authors	DuBarry, Samantha T.; Adams, P. James
Three or More Authors	Franklin, Gregory B.; And Others
Editor or Editors	Chinn, Carole Ann Robertson, Ed. Zane, Ben M., Ed.; Simon, J. T., Ed.
Compiler or Compilers	MacDonald, Arthur, Comp. Horning, Jenny, Comp.; Lee, Jon, Comp.
Incorrect are:	And others and Others and others And Others. (Note: Do not use the period.)
Incorrect are:	Eds. Comps.

NAME VARIATIONS[13]

Ali, Muhammad
Burne-Jones, Jennifer
Ching, Francis K. W.
D'Amico, Roberta G.
DeAnda, Natividad
deJung, John
de la Rosa, Raul
De Weaver, Norma
de Wolf, Virginia
DiBasio, Anthony J.
Goethe, Johann Wolfgang von
Johnson Smith, Geoffrey
La Bruyere, Rene
La Fontaine, Jean de
Lopes da Silva, Gabriela
MacIntyre, Edward Leon
McDonald, Kathleen D.
Monteith, Mary K (middle initial does not stand for anything)
Musset, Alfred de
O'Brien, John P., III
St. James, Lynn
Stands in Timber, John
Sun, Yat-sen
Tak, Jan van der
Van Buren, Martin

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[13] For unusual personal names, the correct form of which cannot be determined from the document, consult the latest edition of the *Anglo-American Cataloguing Rules* (section on "Headings for Persons") and *Guidelines for Descriptive Cataloging*, Section 6.

B.5 AVAILABILITY (OTHER THAN EDRS)

Profile

Data Element/Field	- Availability (Other Than EDRS)
Data Entry Tag/Keyword	- AVAIL_
Files	- RIE/CIJE
Mandatory/Optional	- RIE (Mandatory for Level 3, Optional for Level 1 & 2 Documents) - CIJE (Optional—Use for UMI only)
Data Provided By	- Clearinghouse
Character Set	- Alphabetic, Numeric, Special
Subfields Permitted	- No
Field Length	- 500 (Max.); 110 (Avg.)
Field ID No. (Tape)	- 49

TYPICAL ENTRY (RIE)

AVAIL_National Catholic Educational Association, Suite 100, 1077 30th St., N.W., Washington, DC 20007-3852 (Stock No. 3533, $15.50).

TYPICAL ENTRY (CIJE)
(Restricted to only the example cited)

AVAIL_UMI

a. General

This field provides information on the availability of documents from sources *other than* EDRS. (For EDRS availability **see Section V-B.20.**) While the principal purpose of this information is to provide the user with access to documents not available from EDRS (i.e., Level 3 documents), alternate sources should always be cited, when known, even if the document is available from EDRS. This is especially true for publications generated by organizations such as the National Education Association which have given a Reproduction Release for Level 2 processing with the understanding that NEA will be cited as the availability for paper copy. In order to maintain a good relationship with ERIC contributors it is important that Availability information always be cited when known.

The Availability field is intended primarily for the specific document being processed. If Availability information is cited for supplementary material such as accompanying manuals, sets, multimedia formats such as computer diskettes, videocassette tapes, audio cassettes, etc., such information should be clearly indicated.

b. Format of Availability Information

This field should contain all of the following information, when applicable and available:

- Do not use a leading phrase such as "Available from...", "Paper copy available from..." as the computer system automatically inserts the phrase "Available from..." in front of all RIE Availability field entries.

- Full name of the source of the document. Extraneous phrases such as "Subsidiary of..." should be omitted. In the case of large organizations, use subunit names, when necessary, to achieve accurate mail delivery; however, stock names such as "Order Dept." that add nothing should be omitted. For non-English names, retain the source of the document in the language it was written; that is, do not translate the organization name into English. (If the source regularly abbreviates part of its name, e.g., NEA Professional Library, do not spell it out in the field.)

- Complete mailing address, including street number or Post Office box number (as with the organization name, do not translate into English).

  — For U.S. sources, use the standard two-character postal codes for states (see **Figure V-8** for a list of these codes).

  — For U.S. addresses, use the 5-digit Zip code, or, if available, the 9-digit "Zip plus 4" code.

  — For non-U.S. addresses, the postal codes may be a combination of alphanumerics; record those exactly as found, including spaces. Include the country name; do not abbreviate.

  — Standard abbreviations for "Street" (St.), "Avenue" (Ave.), Drive (Dr.), "Boulevard" (Blvd.) and "post office" (P.O.) may be used, but do not use other abbreviations.

  — Directional names such as "N.W." for "Northwest," E. for "East," etc. should include the period. Do not write "NW" for Northwest.

- Catalog, Stock, International Standard Book Number (ISBN), or Order Number, when appropriate. This would include such things as the GPO Stock Number, the University Microfilms Order Number, etc. It does not include the Library of Congress (LC) Card Number, which is not an order number. (Although the ISBN is recorded in the Report Number field, it is sometimes necessary to repeat it in the Availability field in order to differentiate between paperback and hardcopy editions that may both be available.)

- Do not use the cent (¢) sign as it is not in the ERIC Character set. Change prices quoted in cents to dollars, e.g., 75¢ change to $0.75.

- Price of the document (in parentheses). Prices quoted in non-U.S. currencies should not be abbreviated and may use only characters appearing in the ERIC Character set (e.g., "2 pounds, 20 pence" should be entered for "2 £ 20d"). Do not convert non-U.S. currencies to U.S. dollars since conversion rates fluctuate regularly; use U.S. dollars only if the foreign source provides a U.S. price. For countries such as Canada which also have "dollars" as their currency, specify "$10. Canadian."

  Price information changes rapidly and should therefore be entered as succinctly as possible. Since prices do change, some organizations, such as University Microfilms, have specifically requested that their prices not be included.

- Ordering instructions including postage and handling costs, sales tax, etc. Enter this data within the parentheses after the price. Do not add postage and handling fees to the base price, e.g., "($15, plus $3 handling and shipping)" not "($18)".

- Document characteristics such as paperback and/or hardbound should be indicated and, if known, associated with the appropriate ISBN. **Example:**

  AVAIL_...(paperback: ISBN-0-12346-899-3, $9.95; clothbound: ISBN-0-12346-899-7, $25).

- Availability, if any, of multimedia formats should be precisely stated. For example: 2-hour VHS video cassette; 5¼" computer diskettes; 25 35mm slides; 4 compact disk recordings, etc.

c. The Relationship between Document Level and the Availability Field

(1) Level 1 (Available from EDRS in MF and PC)

Documents announced at Level 1 should always show an alternate availability, if known. Do not omit an alternative availability just because the document will be available from EDRS in paper copy. Most users generally prefer to have an original copy if at all possible. If external availability is cited on the Reproduction Release form, it should be cited in the resume.

Government Printing Office (GPO) sales documents (which should be announced at Level 1) should always show the GPO availability, including the Superintendent of Documents Stock Number when it can be determined from the document or accompanying information. When this number appears in the document, the phrase "Stock Number" generally precedes the number. Do not use the string of numbers which typically appears on the last page of all GPO-printed documents; these numbers are related to the print job and are not for ordering purposes. If a GPO subdivision, e.g., Congressional Sales Office, is cited, include that in the Availability information.

NOTE: Do not cite GPO availability unless such availability is clearly indicated in the document or in accompanying external information. A large portion of documents printed by GPO are not sales items and are not available from it.

(2) Level 2 (Available from EDRS in MF Only)

Documents announced at Level 2 should also cite, when known, any non-EDRS availability of originals or paper copy reproductions. Follow the guidelines for Level 1 documents.

(3) Level 3 (Not Available from EDRS)

Documents processed at Level 3 MUST cite a source where the user can obtain the document. If the price is known, it should always be provided.

d. Multiple Sources of Availability

Sometimes a document is available from several sources. Multiple sources may be cited as long as the space for the field is not exceeded. If the document has an ISBN cited in the Report Number field, the first source cited should be the organization using that number since ISBNs are publisher-specific. If both U.S. and non-U.S. sources are cited, the U.S. source generally should be cited first.

e. Loan Documents

On occasion, all efforts to obtain a reproduction release or to determine an alternate availability for a copyrighted item or a document with poor reproducibility may fail. Under such circumstances, informing the educational community of such an item can only be justified if a loan source can be specified. The loan-availability option should in general be avoided, but when it can be fully justified, it should appear as in the following example:

AVAIL_ERIC/CRESS, Box 3AP, Las Cruces, NM 88003 (on loan).

Loan-availability should not be confused with regular interlibrary loan procedures used by most libraries. Loan documents must have a specific address for the user to contact. [NOTE: This type of availability is extremely rare in ERIC (approximately 20 documents in the entire database, most from the early years of ERIC.)]

f. Supporting Documentation/Audiovisual/Multimedia Materials

Unpublished supporting documentation not included with the report in hand, or separate audiovisual/multimedia (computer programs, diskettes, compact disks, etc.) components associated with the document, should be referred to only if some mode of access can be provided to the user, and the source cited is willing to assume the administrative burden involved, as in the following examples:

AVAIL_Copies of tests used in the evaluation are available from ERIC/CRESS, Box 3AP, Las Cruces, NM 88003.

AVAIL_Copies of the computer programs described in the abstract are available from the University of Illinois, Computer Center, Urbana, IL 61801 ($45).

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g. Special Arrangements

Many organizations that provide their documents to the ERIC database are also engaged in selling these documents for income. In many cases, they are willing to give permission to enter their documents at Level 2 (and often Level 1) as long as ERIC cites the organizations as the source of original printed copies. Organizations that should always be cited as the source for printed copies of their own publications are listed in the *ERIC Acquisitions Arrangement List* which is published annually by the ERIC Facility and updated semiannually.

h. Use of Availability Field in CIJE

The use of the Availability field in CIJE is restricted to an indication of whether the article can be obtained via the University Microfilms (UMI) Journal Article Reprint Service. If the journal from which the article has been extracted appears in the UMI list of journals with which they have a reprinting agreement, then the Clearinghouse should enter "UMI" in this field, as shown below. The computer system automatically expands this to the phrase "Reprint: UMI" in the Master File and in the CIJE printed announcement.

AVAIL_UMI

Incoming CIJE records are validated against a computerized UMI Authority List; entries citing UMI availability are verified and entries without UMI availability are checked to confirm if, in fact, they are not available from UMI.

Subscription and availability information for regularly covered journals is given in the "Source Journal Index" (**see Section V-B.14.d.3**). To cite the Availability of "Oneshot" articles announced in CIJE, the Note field must be used (**see Section V-B.14** for information specifically on "Oneshots").

OFFICIAL POSTAL CODES OF THE UNITED STATES			
STATE	**ABBREVIATION**	**STATE**	**ABBREVIATION**
Alabama	AL	Mississippi	MS
Alaska	AK	Missouri	MO
Arizona	AZ	Montana	MT
Arkansas	AR	Nebraska	NE
California	CA	Nevada	NV
Colorado	CO	New Hampshire	NH
Connecticut	CT	New Jersey	NJ
Delaware	DE	New Mexico	NM
District of Columbia	DC	New York	NY
Florida	FL	North Carolina	NC
Georgia	GA	North Dakota	ND
Hawaii	HI	Ohio	OH
Idaho	ID	Oklahoma	OK
Illinois	IL	Oregon	OR
Indiana	IN	Pennsylvania	PA
Iowa	IA	Rhode Island	RI
Kansas	KS	South Carolina	SC
Kentucky	KY	South Dakota	SD
Louisiana	LA	Tennessee	TN
Maine	ME	Texas	TX
Maryland	MD	Utah	UT
Massachusetts	MA	Vermont	VT
Michigan	MI	Virginia	VA
Minnesota	MN	Washington	WA
		West Virginia	WV
		Wisconsin	WI
		Wyoming	WY
		TERRITORIES	
		Guam	GU
		Puerto Rico	PR
		Virgin Islands	VI

FIGURE V-8: Postal Abbreviations for the United States

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SUMMARY OF SIGNIFICANT RULES

1. If a document is available from any source other than EDRS, that information should be placed in the Availability field. The information provided should contain all that is necessary to permit the user to obtain the document, i.e., full name of source, complete mailing address (including postal state code and Zip code), order number (if any), and price (if available).

2. Level 3 documents (those not available from EDRS) MUST have an entry in the Availability field. This would include documents available only on loan.

3. Punctuation in this field should be done in accordance with the normal rules of English usage. The semicolon does not function as a subfield delimiter in this field.

4. Certain organizations have made arrangements so that ERIC must always cite them as the source of availability for original copies. (See the ERIC ***Acquisitions Arrangement List***.)

5. Unpublished supporting documentation not included with the document in hand, or separate audiovisual/multimedia components associated with the document, cannot be processed by the ERIC delivery system. The availability of such components should be described in the Availability field.

6. The Availability field in CIJE is reserved for information concerning the availability of reprints of journal articles. At the present time, only the University Microfilms International (UMI) reprint service is specifically cataloged. If the journal is available from UMI, then "UMI" is cataloged in this field. The CIJE computer system expands this to "Reprint: UMI." Journal publisher/availability information for the less well known and more difficult to obtain journals that are not listed in the *Source Journal Index*, is placed, when applicable, in the Note field.

7. When citing an availability contact point within an organization, it is better to use a subunit name (or a position title) than a personal name. Specific people come and go, but organizations (and positions) have somewhat more permanence.

EXAMPLES

FEDERAL GOVERNMENT AGENCIES

GENERAL	Name of agency, city, state, and Zip code are generally adequate.
GPO	Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402-9328 (Stock No. 017-080-02092-1, $6.50). Superintendent of Documents, Congressional Sales Office, U.S. Government Printing Office, Washington, DC 20402-9328. NOTE: In 1992, some GPO documents began carrying a Mail Stop as part of the address. When cited, include it in the Availability, e.g., Superintendent of Documents, U.S. Government Printing Office, Mail Stop: SSOP, Washington, DC 20402-9328.
NTIS	National Technical Information Service, Springfield, VA 22161 (AD-A102 387/8, MF $3.50, HC $5.50).

PRIVATE SECTOR

GENERAL	Name of organization, a street address or box number is required, along with the city, state, and Zip code; non-U.S. sources should include the name of the country.
COMMERCIAL	UNIPUB, 4611-F Assembly Drive, Lanham, MD 20706 ($11.95—Maryland residents add sales tax).
PROFESSIONAL ASSOCIATION	Association of Governing Boards of Universities and Colleges, One Dupont Circle, Suite 400, Washington, DC 20036 ($12.95 members; $14.95 non-members).

NON-U.S. SOURCE	ROLIG, Roskilde Universitetscenter, hus 21.2, Postbox 260, DK-4000 Roskilde, Denmark. OECD, 2, rue Andre Pascal, 75755 Paris CEDEX 16 France (10 francs).

MISCELLANEOUS

INDIVIDUAL	Walter Jones, P.O. Box 959, Huntsville, AL 35805 ($7.50, while supply lasts).
LOAN	ERIC/CRESS, Box 3AP, Las Cruces, NM 88003 (on loan).
MULTIMEDIA COLLATERAL MATERIAL	Communication Skill Builders, 3830 E. Bellevue, P.O. Box 42050, Tucson, AZ 85733 ($150, kit includes 2 VHS videotapes, Catalog No. 3314).
MULTIPLE SOURCES	International Reading Association, 800 Barksdale Road, P.O. Box 8139, Newark, DE 19714-8139 ($1.75 prepaid); ERIC Clearinghouse on Reading and Communication Skills, Indiana University, 2805 E. 10th St., Suite 150, Bloomington, IN 47408-2698 ($1.75).
VOLUME DISCOUNTS	New England Board of Higher Education, 45 Temple Place, Boston, MA 02111 ($12; non-profit organizations, 9 or more $5 each; others, over 9 copies, $10 each).
UMI	
—REPRINTS OF CIJE ARTICLES	UMI [NOTE: CIJE computer system automatically expands this to "Reprint: UMI".]
—DISSERTATIONS/THESES	University Microfilms, 300 North Zeeb Road, Ann Arbor, MI 48106 (Order No. 91-22343). [NOTE: Do *not* cite UMI prices.]

B.6 CLEARINGHOUSE ACCESSION NUMBER

Profile

Data Element/Field	- Clearinghouse Accession Number
Data Entry Tag/Keyword	- CH_
Files	- RIE/CIJE
Mandatory/Optional	- Mandatory
Data Provided By	- Clearinghouse
Character Set	- Alphabetic, Numeric
Subfields Permitted	- No
Field Length	- 8 (fixed length)
Field ID No. (Tape)	- 17

TYPICAL ENTRY (RIE) CH_TM123456

TYPICAL ENTRY (CIJE) CH_TM543210

a. General

The Clearinghouse Accession Number is assigned by the ERIC Clearinghouses during their input processing, using the two-character alphabetic prefixes which identify each Clearinghouse, followed by six numeric characters. (See **Figure** V-9 for a complete list of Clearinghouse prefix assignments.) This Accession Number is temporary in that it provides identification by Clearinghouse for each record and an in-process control number for use in all technical processes up until the final ED or EJ Accession Number is assigned.

Each file has a separate range of numbers; normally the range of Clearinghouse Numbers used for RIE goes through 499 999 and the range for CIJE begins at 500 000. Assignment of numbers should be continuous and should not skip with a new contract or calendar year.

The Clearinghouse Accession Number is entered in packed form and without spaces, as shown in the above entries. *It must always be the first data element in the resume.* The Number must be present on a record in order for that record to be entered into the ERIC computer system. It is the key element that distinguishes one set of data from another. Data being processed without a Clearinghouse Accession Number or with one in an incorrect format (e.g., error in the prefix, too few digits, etc.) will be treated as part of the immediately preceding record. Data being processed with a Clearinghouse Accession Number that duplicates a previous number will overlay the previous record. For this reason, two resumes must never be assigned the same number. Clearinghouse Accession Numbers must be unique, sequentially assigned numbers.

For both RIE and CIJE, the Clearinghouse Accession Number is used as the basis for assignment of the ED and EJ numbers; that is, the records are sorted numerically by Clearinghouse Number and then the ED or EJ numbers assigned. Hence, related items must be in sequential order adjacent to each other for them to appear in the database, abstract journal, and microfiche next to each other.

ERIC CLEARINGHOUSES—A COMPLETE LIST (WITH PREFIXES)		
PREFIX	**CLEARINGHOUSE**	**STATUS**
AA	ERIC Facility Contractor (For RIE); CIJE Publisher (For CIJE)	Current
AC	Adult Education	Merged into CE in 1973
AL	Linguistics	Merged into FL in 1971
CE	Adult, Career, and Vocational Education *(including input of Adjunct ERIC Clearinghouse for Consumer Education, since June 1991)*	Current
CG	Counseling and Personnel Services	Current
CS	Reading and Communication Skills	Current
EA	Educational Management	Current
EC	Handicapped and Gifted Children	Current
EF	Educational Facilities	Merged into EA in 1970
EM	Educational Media and Technology	Merged into IR in 1974
FL	Languages and Linguistics *(including input of Adjunct ERIC Clearinghouse on Literacy Education for Limited-English-Proficient Adults, since September 1989)*	Current
HE	Higher Education	Current
IR	Information Resources	Current
JC	Junior Colleges	Current
LI	Library and Information Sciences	Merged into IR in 1974
PS	Elementary and Early Childhood Education	Current
RC	Rural Education and Small Schools	Current
RE	Reading	Merged into CS in 1972
SE	Science, Mathematics, and Environmental Education	Current
SO	Social Science/Social Studies Education *(including input of Adjunct ERIC Clearinghouse for Art Education and Adjunct ERIC Clearinghouse on United States-Japan Studies, since March 1990)*	Current
SP	Teacher Education	Current
TE	Teaching of English	Merged into CS in 1972
TM	Tests, Measurement, and Evaluation	Current
UD	Urban Education	Current
VT	Vocational and Technical Education	Merged into CE in 1973

FIGURE V-9: ERIC Clearinghouses—A Complete List (with Prefixes)

b. RIE Documents

(1) Clearinghouse Accession Numbers May Be Re-Arranged

For the RIE portion of the database, the Clearinghouse Accession Number typically is placed on a document at the time it is selected for inclusion in the database; the item is also entered on the Acquisitions Data Report (ADR) at about the same time. These actions generally take place before cataloging and abstracting. If, after the assignment of a number, a document is determined to be part of a series or to be out of sequence in its series, the Clearinghouse Accession Numbers should simply be changed around to reflect the natural order of the series.

It is important to realize that even if the Clearinghouse Accession Numbers have already appeared in the ADR, they can still be re-arranged within a series. From the user's standpoint it is always better to have related documents, especially documents in a series, announced in their natural sequence. If that means changing a number assignment, then that should be done. Clearinghouse numbers are not immutable just because they have been assigned. They should be regarded as merely a means for entering documents into the database. At no time does the ERIC computer system check the Clearinghouse Accession Number on the incoming resume against the in-process ADR file.

(2) Clearinghouse Accession Numbers Should Not Be Re-Used

If a document is pulled permanently from processing for any reason, the Clearinghouse Accession Number should not be re-used. Re-use of numbers can cause many problems with internal recordkeeping. There is no requirement that Clearinghouse Accession Numbers be "gapless"; such a requirement would be impractical because documents are frequently removed after accessioning when they are found to be duplicates, to have reproducibility problems, etc.

(3) Number on the Document and on the Resume Must Agree

Prior to the completion of final processing, the Clearinghouse Accession Number on the resume should be checked against the number on the document and any discrepancies corrected.

c. CIJE Articles

Because Clearinghouse Accession Numbers for CIJE journal articles are not reported in the same fashion as they are for RIE documents (i.e., typically the numbers used for CIJE are tracked using the shipping sheets for each journal) or because the numbers may not be assigned until just prior to final processing, it is relatively easy for a Clearinghouse to inadvertently use Clearinghouse Accession Numbers more than once. If a Clearinghouse detects duplication after transmission of the records, it should contact the Facility. However, since the data for CIJE only remain at the Facility for a week before being sent to the CIJE Publisher, duplicates detected after the first week should be reported directly to the CIJE Publisher.

As was noted earlier, the use of the same Clearinghouse Accession Number on two different items will cause the second occurrence to overlay the earlier input. In RIE, overlaps usually just affect the two records directly involved. In CIJE, however, where all articles from a particular journal issue are assigned sequential Clearinghouse Accession Numbers, overlays will have an impact on the entire group of accessions. Consequently, CIJE overlays require all the items from two different journal issues to be removed until the numbering problems can be resolved. Therefore, it is especially important that Clearinghouse Accession Numbers assigned to journal articles be carefully reviewed during cataloging.

SUMMARY OF SIGNIFICANT RULES

1. Clearinghouse Accession Numbers are made up of the standard two-character prefix[14] identifying each Clearinghouse, followed by six numeric characters, all in packed form, e.g., "TM123456."
2. Clearinghouse Accession Numbers are unique, sequentially assigned numbers and two documents may not be assigned the same number.
3. The Clearinghouse Accession Number on the document and on the resume must be in agreement.
4. Documents appearing in a sequential series or in multiple volumes should be assigned similarly sequential Clearinghouse Accession Numbers (assuming they are to be in the same issue of RIE), e.g., Vol. 1 = AA001234; Vol. 2 = AA001235; Vol. 3 = AA001236.
5. When referred to within other ERIC records, Clearinghouse Accession Numbers are cited in the format "AA 001 234."

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[14] Clearinghouse prefixes are established by the ERIC Program Office and historically have remained stable despite later name changes or assignment to a new contractor. Only major Clearinghouse consolidations have brought about prefix changes.

B.7 CONTRACT/GRANT NUMBER

Profile

Data Element/Field	- Contract/Grant Number
Data Entry Tag/Keyword	- CONT_
Files	- RIE
Mandatory/Optional	- Optional
Data Provided By	- Clearinghouse
Character Set	- Alphabetic, Numeric, Special
Subfields Permitted	- Yes
Field Length	- 85 (Max.); 14 (Avg.)
Field ID No. (Tape)	- 46

TYPICAL ENTRY (RIE Only)

CONT_RI8806201; G0087-C1001-90

a. General

The Contract Number and Grant Number are the alphanumeric tags assigned by a sponsoring agency to designate the financial support given the work or research reported in the document. Prior to the January 1991 RIE (ED 322 286), ERIC had two separate fields, one for Contract Numbers and one for Grant Numbers. Formerly, a distinction could be made between Grants and Contracts in that the scope of work of grants was usually broader and more general and did not contain lists of specific tasks and deliverables. A contract, on the other hand, usually specified certain tasks or contract-deliverable items, and the contracting agency monitored the effort to ensure that all contractual obligations were met. Over time, the distinction between the two has become "fuzzy" and additional funding instruments have been introduced (e.g., "cooperative agreements"). All types of funding instruments are now recorded in the Contract/Grant field.

If a funding number does not appear in the document, it may be supplied by the cataloger, if the information is readily available from another reliable source. However, research by the cataloger for this purpose is optional.

All Contract/Grant Numbers that appear on documents accessioned for input to RIE are to be cited in the Contract Number field[15]. Regardless of nomenclature, all alphanumeric identifiers assigned by a supporting/sponsoring agency should be cataloged if they relate to funding (do not confuse these designators with project numbers). Because there is an ever-expanding variety of funding arrangements, catalogers should simply record these funding numbers rather than attempting to determine if they are true contract/grant numbers.

Most Contract Numbers will have alphabetic prefixes serving to identify the sponsoring agency; these should be captured whenever available as they serve both to identify the Contract Number as to its source and to group together in printed indexes the various Contract Numbers of the same agency. Typically Grant Numbers have a "G" prefix followed by a numeric string.

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[15] Through June 1976, the Contract Number field was restricted to Office of Education and National Institute of Education contracts.

However, since some U.S. Government agencies have contract numbering systems that do not involve alpha prefixes, it is necessary to permit also the capture of Contract/Grant Numbers that are purely numeric. The general rule is to capture the Contract/Grant Number as it appears on the document.

Do not use the word "Contract." This call-out will be inserted in the RIE announcement by the computer system.

b. Patterns in Government Contract Numbers

At one time there were various stable patterns in the Government funding numbers of major agencies that, when known, helped to simplify the job of cataloging them. However, funding number formats, for the most part, no longer exhibit these patterns or, when they do, the patterns may be short-lived. The situation is further complicated because the contractor/grantee organizations receiving the funding are not consistent in how they record the funding numbers on their publications. For these reasons, catalogers should generally record the numbers as found.

c. Office of Educational Research and Improvement (OERI) Contract Numbers

Contract Numbers emanating from OERI currently exhibit the following format:

CONT_RI88062001

with the standard prefix "RI" and no spaces between the RI and the rest of the number.

SUMMARY OF SIGNIFICANT RULES

1. Catalog any and all funding numbers, including Grant Numbers, appearing on the document.

2. Multiple Contract/Grant Numbers must be separated by a semicolon and a space.

3. Alphabetic prefixes identifying the Sponsoring Agency are desirable and should be used when available.

4. Do not confuse Project Numbers and Report Numbers with Contract/Grant Numbers.

5. Contract/Grant Numbers may occasionally appear on certain kinds of documents (e.g., speeches, conference papers) for which no preparing institution or sponsoring agency is given. This fact should not prevent the cataloger from capturing the valid Contract/Grant Number information that is available. However, under normal circumstances a Contract/Grant Number implies both a preparing institution and a sponsor, and the cataloger should make an effort to identify both.

6. The parts of a Contract/Grant Number should be separated from each other by hyphens (unless the number specifically uses another special character, such as a slash). Blank spaces in a Contract/Grant Number should be replaced by hyphens. No blank spaces are permitted.

7. Generalized statements of financial support or sponsorship should not be entered in the Contract/Grant Number field, but rather described in the Note field, if felt by the cataloger to be significant, e.g., "NOTE_Sponsored by the civil rights offices of California and Nevada."

8. OERI Contract Numbers currently exhibit the format "RI9100000," with an "RI" prefix and no spaces between the prefix and the rest of the number.

EXAMPLES

SINGLE CONTRACT NUMBER	N00014-79-C-0323
SINGLE GRANT NUMBER	G008700-345
MULTIPLE FUNDING NUMBERS	MDR-8470342; RI88620012; G0098C0226
CONTRACT NUMBER WITH ALPHA PREFIX	DOT-HS-6-01336 NCES-RS-8800-3001 HRA-231-90-0032 ADM-G-87-34700
CONTRACT NUMBER WITHOUT ALPHA PREFIX	400-80-0060
SUBDIVISIONS OF CONTRACTS	400-84-0000-P-5 400-84-0000-P-6
OERI	RI88062001

B.8 DESCRIPTORS

Profile

Data Element/Field - Descriptors
Data Entry Tag/Keyword - DESC_
Files - RIE/CIJE
Mandatory/Optional - Mandatory (at least One Major)
Data Provided By - Clearinghouse
Character Set - Alphabetic, Numeric, Special (Parentheses only)
Subfields Permitted - Yes
Field Length - Individual Subfield: 50; Field: 700 (Max.); 266 (Avg.)
Field ID No. (Tape) - 35

TYPICAL ENTRY

DESC_*Career Planning; *Demand Occupations; *Employment Opportunities; Vocational Education; Postsecondary Education; *Employed Women; Career Counseling

a. General

This field is reserved for the entry of valid Descriptors, which are defined as indexable (Main) terms appearing in the *Thesaurus of ERIC Descriptors*. This is a mandatory field for RIE and CIJE. Other terms that appear in the *Thesaurus*, such as Used For references (from Synonyms to Main Terms) and Invalid Descriptors (former Descriptors that have been discontinued and that have their "life span" indicated by beginning and ending dates in parentheses), may not be used in this field. Instructions for Indexing appear in Section VII of this Manual. Instructions for introducing new Descriptors appear in Section VIII, Part 1, of this Manual.

b. Indexing Depth

As a general guide, the average number of terms assigned documents in RIE is twelve (12), and this is a reasonable average. Some documents will require more terms for adequate indexing, and many will require fewer. Since RIE documents are, on the average, considerably longer than articles in CIJE, the number of terms assigned to documents is usually greater than the number assigned to articles. The average number of terms assigned an article in CIJE is ten (10). Use of the most specific applicable Descriptors will generally permit staying within reasonable limits.

c. Major Descriptors

Major Descriptors are those that indicate the primary subjects of the document/article. Major Descriptors are tagged with a preceding asterisk (*) on the resume (and in the computer record). All index terms not preceded by an asterisk are automatically considered "Minor" for that document. Any index term may be Major or Minor, depending on the document/article.

The purpose of tagging Major Descriptors is to:

- Identify those Descriptors that are to become entries in the RIE/CIJE printed Subject Index.
- Identify the principal subject(s) in the document/article for users scanning resumes (in RIE/CIJE, on microfiche, or via computer searching) thereby providing information helpful in the evaluation and determination of relevant references.
- Permit discrimination in computer searching between major and minor subject indexing.

AT LEAST ONE MAJOR DESCRIPTOR MUST BE ASSIGNED. The guidelines allow either:

- a maximum of 6 Major Descriptors and 1 Major Identifier;

or

- a maximum of 5 Major Descriptors and 2 Major Identifiers.

AT NO TIME IS THE NUMBER OF MAJOR DESCRIPTORS TO EXCEED SIX (6), EVEN IF NO MAJOR IDENTIFIERS ARE USED. The total number of all MAJOR indexing terms (Descriptors and Identifiers together) may not exceed seven (7).

Since at least one Major Descriptor must be assigned to each record, this ensures at least one subject route to the record via the printed indexes. The rule restricting the total number of major indexing terms is necessary in order to keep the printed indexes from becoming excessively large.

d. Educational Leveling Terms

All documents and articles must be tagged with Descriptors indicating educational level, if they deal with a specific level. (**See Section VII** of this Manual.)

e. Publication Type Terms

Descriptors that duplicate exactly the names of Publication Type categories, may not be used as index terms (either Major or Minor) unless the concept is genuinely the subject of the document (and not just its form). (**See Figure V-13.**) The 22 Descriptors so limited are discussed in greater detail in Section VII of this Manual.

f. Format

- Each Descriptor, except the last, is followed by a semicolon (the standard subfield delimiter) and a space.
- The only punctuation permitted in the Descriptor field (other than the subfield delimiter) are parentheses, which are used to set off parenthetical qualifying phrases.
- There is no requirement for any particular order or sequence of Descriptors, and Major Descriptors do not have to precede Minor Descriptors, or vice versa.

- Descriptors are to be spelled exactly as they appear in the *Thesaurus (Working Copy)*. Spacing of multi-word Descriptors must conform precisely to that in the *Thesaurus*., e.g., **"Check Lists"** not **"Checklists"**; **"Programing (Broadcast)"** not **"Programming (Broadcast)"**; **"Postsecondary Education"** not **"Post Secondary Education."**

- Descriptors are normally entered with the first letter of each word capitalized. Articles, prepositions, and conjunctions are not capitalized when used in Descriptors, unless they appear as the first word, e.g., **"Adjustment (to Environment),"** **"Food and Drug Inspectors,"** **"Off the Job Training"** (see **Figure VII-11** entitled "Capitalization of Articles/Conjunctions/Prepositions in Descriptors and Identifiers" in Section VII, "Indexing" of this Manual).

- The formally published edition of the *Thesaurus* is prepared in upper and lower case. The internal computer-printed "Working Copy" edition is, however, printed in all upper case and terms must, therefore, be converted to upper/lower case format by the indexer at the time of indexing. One should index from the "Working Copy" since the formally published edition rapidly becomes out-of-date.

SUMMARY OF SIGNIFICANT RULES

The rules for the selection of Descriptors in the indexing process are covered in detail in Section VII of the EPM, dealing with "Indexing." The rules for the introduction of new Descriptors are covered in detail in Section VIII, Part 1 of the EPM, dealing with "Vocabulary Development and Maintenance." Therefore, the rules covered here have been restricted to those pertaining to the data entry of Descriptors.

1. The Descriptor field is a mandatory field for both RIE and CIJE.

2. Descriptors used in the indexing process must be in the *Thesaurus of ERIC Descriptors* and must be spelled and spaced exactly as they appear in the *Thesaurus*.

3. Descriptors expressing the "major" subject matters of a document/article must be preceded by an asterisk (*) in order to distinguish them from the less substantial or "minor" topics, and to designate entries for the printed subject indexes.

4. At least one (1) major Descriptor must be assigned to each ERIC record; not more than five (5) major Descriptors are permitted for each record (six if only one or no major Identifier is used). The total number of assigned Descriptors is restricted by the field size of 700 characters, including punctuation and space.

5. Multiple Descriptors are separated by semicolons, followed by a space.

6. If a document is concerned with a particular educational (grade/academic) level, the indexer must provide a Descriptor indexing the document to that level. (See **Figure VII-2** in Section VII, entitled "Mandatory 'Educational Level' Descriptors.")

7. With the exception of certain popularized acronyms (e.g., DNA, FLES, etc.), Descriptors are written with initial capital letters. Except when used as the initial word, articles, prepositions, and conjunctions are not capitalized in a Descriptor.

8. Descriptors are written without punctuation or special characters, with the sole exception of parentheses (used to enclose a qualifier).

9. Descriptors that duplicate exactly the names of Publication Type categories may not be used as index terms (either Major or Minor) unless the concept is genuinely the subject of the document (and not just its form). (The 22 Descriptors so limited are listed in **Figure V-13**.)

10. There is no requirement for Descriptors to be entered in any particular order or sequence, i.e., Descriptors do not have to be entered in alphabetic sequence and Major Descriptors do not have to precede Minor Descriptors, or vice versa.

EXAMPLES

For examples of Descriptor entries, see examples in "Indexing" (Section VII of the EPM).

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B.9 GEOGRAPHIC SOURCE

Profile

Data Element/Field	- Geographic Source
Data Entry Tag/Keyword	- GEO_
Files	- RIE
Mandatory/Optional	- Mandatory
Data Provided By	- Clearinghouse
Character Set	- Alphabetic
Subfields Permitted	- Yes (for the 4 primary English-speaking countries)
Field Length	- 39 (Max.); 15 (Avg.)
Field ID No. (Tape)	- 77

TYPICAL ENTRY (RIE Only)

GEO_U.S.; Indiana

a. General

The Geographic Source field is intended to indicate the country of origin (usually the place of publication) of a document. The data element answers the basic question "Where did the document come from?" Usually the country of origin is identical to the place of publication.

For the four primary English-speaking countries, which provide the bulk of the input to ERIC, the cataloging is extended to the state or provincial level:

- **United States**—the states, District of Columbia, and possessions (America Samoa, Guam, Northern Mariana Islands, Puerto Rico, Virgin Islands).

- **Canada**—the provinces and territories: (Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland, Northwest Territories, Nova Scotia, Ontario, Prince Edward Island, Quebec, Saskatchewan, Yukon Territory).

- **United Kingdom**—the four major units comprising that country: England, Scotland, Northern Ireland, and Wales.

- **Australia**—the major divisions of that country: New South Wales, Northern Territory, Queensland, South Australia, Tasmania, Victoria, Western Australia, and Australian Capital Territory.

If it is necessary to determine the state, province, or territory of a given city, an authoritative gazetteer should be used. Except for the four countries above, all other entries in this field are at the country level and are not further subdivided.

b. Geographic Authority List

A Geographic Authority List, used for computer validation of the entries in this field, has been developed and appears as **Figure V-10**. This list is comprehensive in that all countries recognized as such as of May 1992 are included; the list is updated by the Facility whenever a new country is created, dissolves, or changes its name. It should be noted that with the sole exception of the United States, all country names are spelled out and not abbreviated. Since the vast majority of documents are domestic, in the interest of brevity, "U.S." is to be used in lieu of "United States." Records not carrying a "U.S." in this field will be, by definition, "foreign" documents.

c. Geographic Source and Document's Subject

This field should not be confused with the subject of the document. If a country or geographic area is the subject of the document, it should be entered in the Identifier field.

d. Determination of What Name To Use

(1) Only City/Town Known

As with all cataloging, this data element is to be determined from evidence in the document itself. Research beyond the document is usually not necessary; in many instances the Reproduction Release Form will reflect the appropriate country and/or its subdivision. However if a city in the United States, United Kingdom, Australia, or Canada is listed and the document or the release form does not provide the state, province or other subdivision for one of these countries, then a gazetteer should be consulted. Since there are many cities and towns with the same name, especially in the United States (e.g., there's a "Springfield" in most states), information found in an atlas or gazetteer may need to be corroborated by data in the document.

(2) Joint Authors and/or Institutions Located in Different States or Subdivisions of One of the Four English-Speaking Countries

The first-named author or institution is usually considered the principal author/institution and takes precedence over the second and subsequent authors/institutions in determining the Geographic Source. If the principal authorship or institution cannot be determined for some reason, then the country name alone can be used. In actual practice this is rarely necessary.

(3) Joint Authors and/or Institutions Located in Different Countries

The first-name precedence cited above should be used if the Corporate Source is in different countries. However, a choice of one country must be made. Do not enter two country names (e.g., GEO_U.S.; France).

(4) Author Location vs. Conference Location

Individual papers from a conference normally will be cataloged based on the geographic location of the author and not where the conference was held. The location of the conference is strictly incidental. Groups move their conferences around for a variety of reasons. More fundamental is the location where the author resided when the paper was prepared. If the GEO choice is between these two, choose the author's location. If all that is known is the conference location, then use that.

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(5) Change in Author's Location

The location of an author may change between the time a document is prepared and the time a document is submitted to ERIC. The location of the author cited on the document at the time a document was *prepared* should be cataloged. Do not use the author's new location unless the original location cannot be determined.

(6) Corporate Author (Preparing Institution) Location vs. Author's Location

Documents produced by organizations with established locations frequently are prepared by authors located elsewhere. The location of the Corporate Author (Institution) takes precedence over the individual author. For example, documents produced by the National Education Association (NEA) located in Washington, D.C. will be cataloged as "U.S.; District of Columbia."

(7) Document Distribution Location

Organizations such as NEA and UNESCO sometimes have a distribution point which is not in the same place as the organization itself. The location of the distributor should not be considered the Geographic Source.

(8) Government Agency Location

Federal government agencies typically have their headquarters in Washington, D.C.; however, many of the divisions as well as regional offices producing documents are located elsewhere. The Geographic Source should be that of the location of the division or regional office producing the publication and not the location of the headquarters in Washington, D.C.

(9) Analytics

Documents such as conference proceedings, collections of commissioned papers, etc., which are analyzed as separate accessions, in addition to being entered in their entirety, should be treated exactly as they would be as separate papers. The entire proceedings or collection should be cataloged with the location of the publisher or corporate source; the analytics should be cataloged in accordance with the respective authors' affiliations. If the location of the individual authors is not provided, then the location of the publisher or corporate source may be used; authors' affiliations are usually listed in the prefatory matter or appendix of the parent document or in the individual document itself.

e. Typical Errors in This Field

RIE processing staff should be on the alert for several errors that occur regularly in this field:

- assignment of a city instead of a state or province;
- assignment of Africa, a continent, instead of a country in Africa;
- assignment of multiple countries;
- assignment of China (i.e., mainland, Peoples Republic) for Taiwan (nationalist China);
- assignment of Ireland for Northern Ireland.

f. Historical Background of Data Element

This data element was added to the ERIC file beginning with the January 1979 issue of RIE (ED 157 988). It is not used in CIJE.

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SUMMARY OF SIGNIFICANT RULES

1. The Geographic Source field is used to indicate the country of origin of the document. It should not be confused with the subject matter of the document.

2. Country names are cited in the same format in which they appear in the Geographic Authority List.

3. For purposes of the GEO field, the four principal English-speaking countries (U.S., United Kingdom, Canada, Australia) are subdivided to the state, province, or territory level.

4. Individual papers presented at conferences should be identified with the geographic location of the principal author.

5. Analytics should be treated as individual papers, each potentially from a different location, and should not all be identified with the Geographic Source of the parent document.

6. When there are multiple authors, each from different locations, and no other clues as to where the document came from or was published, use the location of the prime/principal (first listed) author.

7. The Geographic Source field is not used in CIJE.

EXAMPLES

DOMESTIC, WITH STATE	U.S.; Indiana
DOMESTIC, WITH POSSESSION	U.S.; Guam
DOMESTIC, STATE UNDETERMINABLE	U.S.
UNIT OF UNITED KINGDOM	United Kingdom; Scotland
PROVINCE OF CANADA	Canada; Alberta
UNIT OF AUSTRALIA	Australia; Queensland
NON ENGLISH-SPEAKING COUNTRY	France

Afghanistan
Alabama
Alaska
Albania
Alberta
Algeria
American Samoa
Andorra
Angola
Anguilla
Antigua and Barbuda
Argentina
Arizona
Arkansas
Armenia
Aruba
Australia
Australian Capital Territory
Austria
Azerbaijan
Bahamas
Bahrain
Bangladesh
Barbados
Belarus
Belgium
Belize
Benin
Bermuda
Bhutan
Bolivia
Bophuthatswana
Bosnia and Herzegovina
Botswana
Brazil
British Columbia
Brunei
Bulgaria
Burkina Faso
Burundi
California
Cambodia
Cameroon
Canada
Cape Verde
Central African Republic
Chad
Chile
China
Ciskei
Colombia
Colorado
Comoros
Congo
Connecticut
Cook Islands
Costa Rica
Croatia
Cuba
Cyprus
Czechoslovakia
Delaware
Denmark
District of Columbia
Djibouti
Dominica
Dominican Republic
East Germany
Ecuador
Egypt
El Salvador
England
Estonia
Equatorial Guinea
Ethiopia
Federated States of Micronesia
Fiji
Finland
Florida
France
French Polynesia
Gabon
Gambia
Georgia
Germany
Ghana
Greece
Grenada
Guadeloupe
Guam
Guatemala
Guinea
Guinea Bissau
Guyana
Haiti
Hawaii
Honduras
Hong Kong
Hungary
Iceland
Idaho
Illinois
India
Indiana
Indonesia
Iowa
Iran
Iraq
Ireland
Israel
Italy
Ivory Coast
Jamaica
Japan
Jordan
Kansas
Kazakhstan
Kentucky
Kenya
Kirgizstan
Kiribati
Kuwait
Laos
Latvia
Lebanon
Lesotho
Liberia
Libya
Liechtenstein
Lithuania
Louisiana
Luxembourg
Macao
Macedonia
Madagascar
Maine
Malawi
Malaysia
Maldives
Mali
Malta
Manitoba
Marshall Islands
Martinique
Maryland
Massachusetts

FIGURE V-10: **Geographic Authority List (Page 1 of 2)**

Mauritania
Mauritius
Mexico
Michigan
Minnesota
Mississippi
Missouri
Moldova
Monaco
Mongolia
Montana
Montserrat
Morocco
Mozambique
Myanmar
Namibia
Nauru
Nebraska
Nepal
Netherlands
Netherlands Antilles
Nevada
New Brunswick
New Caledonia
New Hampshire
New Hebrides
New Jersey
New Mexico
New South Wales
New York
New Zealand
Newfoundland
Nicaragua
Niger
Nigeria
Niue
North Carolina
North Dakota
North Korea
Northern Ireland
Northern Mariana Islands
Northern Territory
Northwest Territories
Norway
Nova Scotia
Ohio
Oklahoma
Oman
Ontario
Oregon
Pacific Trust Territory
Pakistan
Palau
Panama
Papua New Guinea
Paraguay
Pennsylvania
Peru
Philippines
Poland
Portugal
Prince Edward Island
Puerto Rico
Qatar
Quebec
Queensland
Reunion
Rhode Island
Rumania
Russia
Rwanda
Saint Kitts and Nevis
Saint Lucia
Saint Vincent and the Grenadines
San Marino
Sao Tome e Principe
Saskatchewan
Saudi Arabia
Scotland
Senegal
Seychelles
Sierra Leone
Singapore
Slovenia
Solomon Islands
Somalia
South Africa
South Australia
South Carolina
South Dakota
South Korea
Spain
Sri Lanka
Sudan
Surinam
Swaziland
Sweden
Switzerland
Syria
Taiwan
Tajikistan
Tanzania
Tasmania
Tennessee
Texas
Thailand
Togo
Tonga
Transkei
Trinidad and Tobago
Tunisia
Turkey
Turkmenistan
Turks and Caicos Islands
Tuvalu
U.S.
Uganda
Ukraine
United Arab Emirates
United Kingdom
Uruguay
Utah
USSR
Uzbekistan
Vanuatu
Vatican City State
Venda
Venezuela
Vermont
Victoria
Vietnam
Virgin Islands
Virginia
Wales
Wallis and Futuna Islands
Washington
West Germany
West Virginia
Western Australia
Western Sahara
Western Samoa
Wisconsin
Wyoming
Yemen
Yugoslavia
Yukon Territory
Zaire
Zambia
Zimbabwe

FIGURE V-10: **Geographic Authority List (Page 2 of 2)**

B.10 GOVERNMENTAL STATUS

Profile

Data Element/Field	- Governmental Status
Data Entry Tag/Keyword	- GOV_
Files	- RIE
Mandatory/Optional	- Optional
Data Provided By	- Clearinghouse
Character Set	- Alphabetic
Subfields Permitted	- No
Field Length	- 13 (Max.); 6 (Avg.)
Field ID No. (Tape)	- 78

TYPICAL ENTRY (RIE Only)

GOV_Federal

a. General

Governmental Status is intended primarily to indicate whether the document is a publication of a Federal, State, or Local (i.e., City, County) governmental body in the United States and its territories. Outside the United States, governmental documents are cataloged as either "Foreign" or "International."

b. Governmental Documents within the United States

Legislative, judicial, and executive/regulatory agencies are defined as governmental in this context. Commissions formed under executive authority or legislative mandate are included. Schools, colleges, universities (and districts or systems of such institutions) are excluded, even if tax-supported.

The document must be an official production of the governmental body involved. Contractor reports are not to be considered government documents unless they have been issued under the auspices of the agency involved, e.g., complete with seal, agency imprint, agency logo or other official indicators. Publications from the National Center for Education Statistics (NCES) are frequently issued in this manner.

Non-official papers and speeches of government employees are not normally considered government documents. However, papers, speeches, testimony, etc., of government officials acting in their official capacity are considered government documents. For example, testimony before the House Appropriations Committee on behalf of the Department's budget by the Secretary or Undersecretary of the Department of Education would be considered a government document. Documents published by more than one level of government (e.g., state and local working together) are to be classed at the highest level involved.

(1) Exclusion of Schools, Colleges, Universities

At the time the field was established, a decision was made to exclude schools, school systems, colleges, and universities from the GOV field. The number of individual schools far exceeds the number of regular governmental agencies in any one jurisdiction; because ERIC contains a large number of documents emanating from schools, school systems, and school districts, if they were all coded as governmental, they would swamp the category and prevent the retrieval of the works of agencies normally thought of as governmental. In addition, without research it is sometimes difficult to determine whether a given school is state or local, public or private, tax-supported or not, and schools do not govern or regulate in the same sense as other tax-supported agencies.

(2) Authorities for Determining Governmental Units

There are several reference authorities available for determining if an agency should be considered governmental agency in the United States (including Federal, State, Municipal, County). Among those in use by the ERIC Facility are:

- *United States Government Manual* (issued annually);
- *Federal Yellow Book* (updated quarterly);
- *State Yellow Book* (updated quarterly);
- *Directory of State Education Agencies* (issued annually); and
- *Municipal Executive Directory* (updated semiannually).

c. Governmental Documents Outside the United States

Non-U.S. governmental documents emanating from a foreign country are cataloged as "Foreign" without distinguishing further sub-levels. However, the same exclusion of schools, colleges, and universities applied to U.S. documents also applies to foreign documents. It may be difficult to determine in some cases whether a given "Foreign" document is governmental or not. Unless there is a strong reason to believe it is a government document, do not catalog it as such.

If a document is a product of a multi-governmental body, such as the United Nations (or its constituent organizations), Council of Europe, etc., it should be cataloged as "International." International organizations not comprised of governments should be considered non-governmental and should have no entry in this field. Among the reference authorities used by the ERIC Facility are:

- *Canadian Directory*;
- *Whitaker's Almanack* (United Kingdom); and
- *Statesman's Year-Book* (international).

d. Permissible Terms

The only permissible terms in this field are:

Federal,
State,
Local,
Foreign,
International.

All other variations are invalid, e.g., Federal Government, County, etc.

e. Historical Background

This data element was added to the ERIC file beginning with the January 1979 issue of RIE (ED 157 988). It is not used in CIJE.

SUMMARY OF SIGNIFICANT RULES

1. Documents issued by governmental bodies must be coded in this field. For non-governmental documents this field will be left blank.

2. The permissible entries in this field are:

for domestic documents:	Federal, State, Local
for non-domestic documents:	Foreign, International

3. Schools, colleges, universities, etc., are, for purposes of this field, not regarded as governmental, even if tax-supported.

4. Contractor reports are not to be considered the official publications of government agencies, unless issued under the official imprint of the government agency for which they were done.

EXAMPLES

DOMESTIC (i.e., UNITED STATES) FEDERAL GOVERNMENT	
(e.g., Office of the President, Departments of Education and Health & Human Services, National Science Foundation, Army, Navy, Library of Congress, Senate, House of Representatives, Presidential Commissions, Peace Corps, etc.)	Federal
DOMESTIC (i.e., UNITED STATES) STATE GOVERNMENT	
(e.g., State Offices/Boards of Education, Governor's Office, Commissions, Legislature) *Does not include universities, colleges, etc.*	State
DOMESTIC (i.e., UNITED STATES) LOCAL GOVERNMENT	
(e.g., Mayor's Office, County Dept. of Health, City Transportation Board, Townships, etc.) *Does not include schools, school districts, colleges, or universities.*	Local
FOREIGN GOVERNMENT (i.e., NON-UNITED STATES, ANY LEVEL)	
(e.g., Canada Dept. of Health, Provincial departments of education, etc.) *Do not use for universities, colleges, or local school systems.*	Foreign
INTERNATIONAL (Multi-governmental bodies)	International
(e.g., United Nations, UNESCO, etc.)	
NON-GOVERNMENT	[NOTE: Omit field]

B.11 IDENTIFIERS

Profile

Data Element/Field	- Identifiers
Data Entry Tag/Keyword	- IDEN_
Files	- RIE/CIJE
Mandatory/Optional	- Optional
Data Provided By	- Clearinghouse
Character Set	- Alphabetic, Numeric, Special (Parentheses Only)
Subfields Permitted	- Yes
Field Length	- Individual Subfield: 50; Field: 500 (Max.); 37 (Avg.)
Field ID No. (Tape)	- 36

TYPICAL ENTRY

IDEN_*America 2000; *National Assessment of Educational Progress; Illinois

a. General

The Identifier field provides for additional subject indexing terms that may be required to index a document fully, but which are not appropriate for inclusion in the *ERIC Thesaurus* (or which have not yet been added to it). Such indexing terms include, for example: project names (e.g., Project Head Start), legislation (e.g., Economic Opportunity Act 1964), titles (e.g., Doctor Zhivago), and new subject terms under consideration for Descriptor status once their scope, "staying power" in the Identifier "proving ground," and definition have been established. Rules and guidelines for the selection and creation of Identifiers are detailed in Section VIII (Part 2) of this Manual.

While Identifiers are semi-controlled indexing terms, without the same cross-reference structure as Descriptors, approved Identifiers are displayed in the *Identifier Authority List* (IAL). When entering Identifiers, the IAL (and its supplements) should always be consulted in order to verify the proper format. Desirable indexing terms not found in either the *Thesaurus* or the IAL may be established and used in the Identifier field, following the guidelines in Section VIII (Part 2).

b. Indexing Depth

The use of Identifiers for indexing documents is optional. There is no requirement that an Identifier be assigned to every document. In point of fact, the average number of Identifiers per document is less than one. Use one or more Identifiers only when required to index the document adequately.

c. Major Identifiers

There is no minimum requirement for Identifiers; however, no more than two (2) Identifiers may be asterisked (*) as major indexing terms in any one record. Only one (1) major Identifier may be used if the record has six (6) major Descriptors. As with major Descriptors, only major Identifiers appear in the subject indexes of RIE and CIJE. The purpose and function of major Identifiers is the same as for major Descriptors.

SUMMARY OF SIGNIFICANT RULES

1. Individual Identifiers cannot exceed 50 characters in length, including spaces but excluding the asterisk.
2. Identifiers may not contain any punctuation other than left and right parentheses (to enclose a qualifier).
3. Multiple Identifiers must be separated by semicolons followed by a space.
4. There is no minimum number of Identifiers that may be entered for a given record; the maximum number may not exceed the 500 character field limitation.
5. No more than two (2) Identifiers may be asterisked (*) as major subject terms for any one record.
6. Identifiers should be entered exactly as they appear in the *Identifier Authority List* (IAL). If new, they should be structured in accordance with the guidelines of Section VIII (Part 2) of this Manual.
7. There is no requirement for any particular order or sequence of the Identifiers being entered. Similarly, major Identifiers do not have to precede minor Identifiers, or vice versa.
8. Institutions should not be cited in the Identifier field unless they are actually the subject of the document.
9. Most U.S. and Canadian organization names used as Identifiers should be followed by a two-character postal code showing the state/province location of the organization. For guidance on this rule, **see Section VIII (Part 2).**
10. ERIC Digests should have the minor Identifier "ERIC Digests" assigned.

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EXAMPLES

SINGLE IDENTIFIER	National Education Goals 1990
MULTIPLE IDENTIFIERS (MAJOR/MINOR MIX)	*National Assessment of Educational Progress; Kentucky
PERSONAL NAME IDENTIFIER	Douglass (Frederick)
DOMESTIC INSTITUTIONAL IDENTIFIER (WITH STATE DESIGNATION ADDED)	Riverside Unified School District CA
USES OF PARENTHESES	Apache (Tribe) English (British) Erikson (Erik)
IDENTIFIER CONTAINING NUMERIC CHARACTERS	Chapter 766 (Massachusetts)
IDENTIFIER CONTAINING ACRONYM	Project SPICE UNICEF
LEGISLATION COURT CASES	Americans with Disabilities Act 1990; Rodriguez v San Antonio Independent School District
ABBREVIATED IDENTIFIER (REDUCED TO 47 CHARACTERS)	National Assn of State Univ and Land Grant Coll

B.12 INSTITUTION

Profile

Data Element/Field	- Institution
Data Entry Tag/Keyword	- INST_
Files	- RIE Only
Mandatory/Optional	- Optional
Data Provided By	- Clearinghouse
Character Set	- Character Set—Code (Alphabetic, Numeric); Name (Alphabetic, Numeric, Special)
Subfields Permitted	- Yes
Field Length	- Code (Fixed Length: 8 characters each); Field: 68 (Max.); Name (212 Characters each); Field: 1080 (Max. allowed); 419 (Max. experienced)
Field ID No. (Tape)	- Code: 28; Name: 128

TYPICAL ENTRY (RIE ONLY)

INST_BBB54321=American Education Association, New York, NY. Dept. of Curriculum Innovation.

a. General

The Institution field contains the name of the organization responsible for preparing the document. In library parlance this organization is referred to commonly as the "Corporate Author" or "Corporate Source." Governments and their agencies, societies, associations, institutions, institutes, universities, colleges, companies, commissions, committees, foundations, etc., are all responsible at one time or another for the production or issuance of documents, and the names of these organizations are entered in this field when their documents are cataloged. Entry in this field indicates responsibility for the intellectual creation of the document.

b. Determination of a Corporate Author

The Corporate Author is not a mandatory data element. A document may be simply the product of an individual operating alone, in which case the INST field would be left blank. However, there are certain clues and interrelationships of which the cataloger should be aware:

- Contract Numbers (including Grant Numbers), when present, typically imply a preparing Institution.
- The existence of a Sponsoring Agency in the document implies a recipient of funding and therefore a "doer" (usually an organization, but sometimes an individual).

Phrases such as "sponsored by" appearing on a Title page should not always be taken literally. If the "sponsored by" organization produced the document, then the organization should be cataloged as a Corporate Source.

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(1) Corporate Author vs. Author Affiliation

The corporate author or institution cataloged in this field should not be confused with the address of the Personal Author, i.e., the Personal Author's corporate affiliation is not necessarily equivalent to the Corporate Author. ERIC does not catalog corporate affiliations of authors.

(2) Conference Presentations

No institutional source should be cataloged for a conference paper when there is no indication that the release of the paper was formally controlled or supported by the corporate affiliation of the author. An indication that the a corporate source was involved with the release would be the publication of the paper with a formal cover with the source's logo, report number assigned, etc. For example, a conference paper presented by John Browning of the University of Maryland's School of Education would not be cataloged with the corporate source as the University's School of Education unless the paper was issued as a formal report of the School of Education, with a cover, school logo, report number, etc.

(3) Doctoral Dissertations/Master's Theses

A Doctoral dissertation or Master's thesis normally should not be cataloged with the recipient institution as the institutional source. However, if the dissertation has been done as part of a research project (e.g., National Science Foundation funds the university to conduct long-term research and a doctoral candidate is involved with the dissertation being issued as a report of the project), then the institution would be cataloged. Again, the formal publication, complete with school logo, report number, contract information, etc., would be an indication of the institution's involvement. [**NOTE:** Nova University's practice of issuing its practicum papers under a standard cover does not constitute formal institutional involvement in the sense of a corporate author.]

(4) Commercial Publishers, University Presses, GPO

Commercial publishing companies, college/university presses, the GPO, etc., are not cataloged as institutional sources when acting merely as publishing agents for works that have normal personal or corporate authors. In such cases, the publisher's name, address, and item price are recorded in the Availability field. A commercial publisher can, however, be a corporate author when they are responsible for the actual preparation of a work, e.g., Marquis, Inc., is the corporate author of the standard reference work *Who's Who in America*.

(5) Sources of Journals, Serials, etc.

Associations, organizations, etc., responsible for the production of a newsletter, journal, etc., are not cataloged as corporate authors when individual parts of the publication (e.g., journal articles) are entered in RIE *unless* the organization's involvement with the individual article is specifically stated (e.g., an organization's formal position statement appears as an article in a journal produced by the same organization). When an entire issue, volume, etc., is entered as a single accession, however, then the responsible organizational source is cataloged.

(6) Analytics

Documents entered as analytics (i.e., one complete document such as a proceedings or collection entered in its entirety, with individual papers or parts entered also as separate items) should be cataloged by institution in the same manner as serials discussed above.

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(7) Corporate Source vs. Sponsoring Agency

Corporate Authors should not be confused with Sponsoring Agencies. Sponsoring Agencies provide the funding and financial support for efforts that lead to documents. This is usually done via contracts or grants to the Corporate Author. Sponsoring Agencies are generally Government agencies or foundations and their names are entered in their own field (see **Section V** under "Sponsoring Agency").

(8) U. S. Department of Education, Its Subdivisions, and Contractors

Except in a few situations, subdivisions of the U. S. Department of Education are established under their own names and not under "Department of Education." Since ERIC Clearinghouses, Centers, Regional Educational Laboratories, and the like, are operated under contract to the Department of Education, they are established under their own name and not under that of the contractor:

Example:

Entry: ERIC Clearinghouse on Information Resources, Syracuse, N.Y.

Not used: Syracuse Univ., New York, NY. ERIC Clearinghouse on Information Resources.

[NOTE: Beginning in 1982, all Codes for the Department of Education (ED) and its subdivisions were assigned a prefix of EDD; this prefix allows for easy identification of documents emanating from the units of ED. Searches of online versions of ERIC for all ED documents can easily be restricted using this EDD prefix.]

(9) Contractor/Subcontractor Relationship

Sometimes documents have been prepared by an institution under a subcontract with a prime contractor for a governmental agency (such as OERI or the Department of Education).

Example:

OERI funded Computer Information, Inc., under contract RI890035 to survey the use of computers in education. Computer Information Inc., in turn, subcontracted the work to the Randall and Cromwell Company. When the survey was concluded, the report was written and prepared by Randall and Cromwell, submitted to Computer Information, which in turn submitted the report to OERI.

When such a relationship is prominent on the document, both the main contractor and the subcontractor may be considered as institutions responsible for the work and therefore both cataloged in the Institution field. When the relationship is hidden or buried in the document, the subcontractor can often be ignored. In either case, OERI would still be the only valid sponsor. Whether the contractor or someone the contractor hires does the actual work does not change the fact that a Sponsoring Agency has issued a contract and will hold its contractor (not the subcontractor) responsible for what is produced. The primary contractor should not be interpreted as some sort of Sponsor.

(10) **Consortia**

Consortia are entered under the name of the consortia only. If the consortia is only housed at a university, college, or government agency, do not enter the name under the university, etc. When the entry is made to the *Source Directory*, a cross-reference to the university, along with a brief note, will accompany the main entry. The following example illustrates such an entry:

NAME_Consortia to Improve Educational Networking, Urbana, IL.
UF_Illinois Univ., Urbana. Consortia to Improve Educational Networking.
NOTE_Consortia comprised of educators from Michigan State University, Indiana University, and the University of Chicago. Located on the campus of the University of Illinois, School of Education.

Some consortia do not have a physical location or a mailing address. In those instances, no location will be entered with the name.

(11) **Organizations with Multiple Hosts or Locations**

Government-funded centers occasionally may have several host organizations and documents may carry a center name with several locations, each location representing a host. An example of this is the Center for the Study of Writing with locations at the University of California, Berkeley and Carnegie Mellon University, Pittsburgh. A pro forma cover or title page typically always shows both locations; even when the document clearly originates with only one (in most situations the specific host is listed along with the author). (Some of the covers on documents from multiple-host centers regularly list four or more organizations.) If the specific location is indicated, catalog only that location.

(12) **Associations with No Permanent Address**

Smaller associations may not have a permanent address, but may "float" with the address of either the current president or secretary. In those situations, instead of creating a new Source name whenever an association official changes, only the organization's name is entered and the accompanying note in the *Source Directory* will read: **"Location varies."**

(13) **Organizations (Including Government Agencies) as Issuers & Sponsors of Documents**

Contractor reports should be cataloged with the Performing Institution (contractor) as the "Institution" and the Funding/Supporting Agency (contractee) as the "Sponsor." This should be the rule whether the document is issued as a contractor document (with contractor name and logo) or as an agency document (with agency name and logo).

c. **CIJE Records (Journal Articles)**

CIJE records do not have an Institution field. In those rare instances where an organization appears as an article's "author," e.g., "Guidelines for English Teachers," prepared by the National Council of Teachers of English, the cataloger has two alternatives:

- Omit the information altogether.
- Include the information in the Note field (see discussion of Note field in Section V).

In any case, organization name information may not be included in the Personal Author field.

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d. Cataloging and/or Establishment of Organizational Names

Organizational names should be cataloged and/or established at a level sufficient to trace the document back to its source. Large organizations, e.g., universities, federal agencies, state departments of education, national corporations, etc., must generally have a relevant subdivision in order to accomplish this. When dealing with organizations of modest size (e.g., small businesses in one city, small school systems, most junior/community colleges), however, it is generally not necessary to catalog subdivisions.

- **Documentation for Institutional Names**

  All organizational names which are cataloged must be supported by data in the document (or in rare circumstances, accompanying correspondence).

- **Transient Entities**

  An entity such as a temporary or ad hoc committee of a university, association, etc. may exist for a year or two and then fade from existence, never to be seen again. Rather than clutter up the *Source Directory* with such transient entities, the information may be cited in the Note field.

- **Subunits of Small Organizations**

  Rather than catalog and/or establish a new name for a subunit of an already small organization, it is better to catalog under the main organization and, if necessary, cite the subunit in the Note field. Excessive subdivisions of a small organization which has few postings should be avoided.

- **Information about Organization Is Incomplete and Cannot Be Verified as to Format, Geographic Location, or Relationship to Document**

  When there is insufficient information on which to catalog or create a new Institutional Name, the information may be cataloged in the Note field verbatim, as it appears on the Title Page.

e. ERIC *Source Directory*

When a Corporate Author is identified for a document, the name of the organization should be looked up in the ERIC *Source Directory*. The ERIC *Source Directory* is an authority list of over 33,000 organization names to be used in both the Institution and Sponsoring Agency fields. In order to ensure that the same organization is always cited in the same fashion and to permit ready assembly of consistent printed indexes, all organization names used in the ERIC system are generally constructed in accordance with Section 2: "Organization Name" of the *Guidelines for Descriptive Cataloging of Reports. A Revision of COSATI Standard for Descriptive Cataloging of Government Scientific and Technical Reports*. **(See Attachment 3.)** (Because ERIC contains curriculum guides and other types of documents not covered by the above Guidelines, variations to the COSATI Guidelines by ERIC have occurred and are noted.) Each name is assigned a unique alphanumeric Code and, thereafter, the organization name is entered into the system by specifying the appropriate Code. During computer entry of the data, the system extracts the name from the ERIC *Source Directory* on the basis of the Code and adds it to the proper record in its standardized form.

All standardized forms are based on the pattern: Largest element—geographic location (City, State, or Country)—smallest element (e.g., Yale Univ., Hartford, CT. Computer Dept.). Record names of states and U.S. territories using the standard postal abbreviation. Canadian provinces are not abbreviated, but are entered within parentheses—e.g., Toronto Univ. (Ontario). For all other countries, include the country's name in parentheses—e.g., Trinity Coll., Dublin (Ireland).

The ERIC *Source Directory* (showing both names and codes) is distributed to the ERIC Clearinghouses periodically in three editions: (a) Monthly Cumulative Supplements, listing newly established names and codes developed during the processing of the current issues of RIE; (b) Truncated Edition, listing all names used during the most recent five-year period—this edition is issued annually; (c) Complete Edition (Archival), listing all names ever used (the last edition went through 1986 RIE input)—typically every five years a Complete edition containing all names is produced and distributed to all ERIC components. Since the most active names are in the Monthly Supplements and Truncated editions, these editions should always be consulted first; if a name is not found there, then the Complete edition should be consulted.

If the entity to be cataloged does not appear in the *Source Directory* in the form shown on the document, alternative arrangements of the name should be checked, since the entry on the document may not conform to the standardized name form. The monthly supplements should also be checked for recent entries. Duplicate names, or close variants, should be called to the attention of the ERIC Facility for possible correction.

NOTE: If an entry is found in the *Source Directory* for the organization appearing on the document, but the entry varies slightly in name or location from that on the document, then do not use the entry, create a new, accurate entry instead.

Codes should be cataloged carefully, since an error will generate an incorrect name in the field (if the error happens to match an existing Code) or it will be flagged by the computer (if the format is in error). To help ensure that the Code requested is the actual name desired, the Code along with the equal sign and its desired translation is required. When the field is processed, the computer translation, as well as the requested name, will appear, thus providing a double-check.

Cataloging should then proceed in accordance with one of the following:

- **Single Institution Found in *Source Directory*:**

  INST_BBB00000=Name of Institution

- **Two or More Institutions Found in *Source Directory*:**

  INST_BBB00000=Name of Institution; EYV38140=International Reading Association, Newark, Del.

  Note that the semicolon delimiter must be used in this field to separate individual entries.

The data appearing to the right of the Code (i.e., "equal" sign, followed by organization name) does not determine what goes into the record, but the cataloger's intended organization name must be on the input form to permit the ERIC Facility editors to check the accuracy of the cataloging and to guard against the possibility of transposed characters in the Code. For this reason, the name the cataloger places to the right of the Code may be abbreviated and need not agree perfectly with its equivalent in the authority list.

The organization name normally reflects what is on the document. If existing names do not fit the situation, they should not be used. For example, assume the *Source Directory* contains the name "American Association of Junior Colleges" and assume a document comes in bearing the new name of this organization, "American Association of Community and Junior Colleges." The cataloger may not use the old name but must request that a new name be established. [If a Clearinghouse has information concerning when a name has changed or an organization has moved, that documentation should be sent along with the document so that the older codes/names can have the information included in their Note fields in the *Source Directory*.]

New names requested in connection with Level 3 documents (where the ERIC Facility has no document) must be supported by copies of the pages confirming name, location, etc.

- **Single Name Not Found in ERIC *Source Directory***

  If the institution is not listed in the *Source Directory*, or if the correct Source Code cannot be identified, the desired new Source Name should still be entered, preceded by an equal sign:

  INST_=Maryland State Dept. of Education, Annapolis. Dept. of Research and Evaluation.

- **Two or More Names Not Found in ERIC *Source Directory***

  INST_=Maryland State Dept. of Education, Annapolis. Dept. of Research and Evaluation.; =Maryland State Dept. of Mental Health, Annapolis.

  This format alerts the ERIC Facility that a new Source Code may need to be created. At the conclusion of processing, all new Codes are added to the Authority List and its Monthly Supplement.

- **Mixture of Names Found and Not Found in ERIC *Source Directory***

  If there are several different institutions involved, one which appears in the *Source Directory* (i.e., already has a Code established) and one which needs a new Code created, the entry would be:

  INST_FGK56700=National Education Association, Washington, D. C.; =Ohio State Literacy Council, Columbus.

  or

  INST_=Ohio State Literacy Council, Columbus.; FGK56700=National Education Association, Washington, D. C.

  The order of the names within the field is independent of the way they appear in the document, since the names will be alphabetized when the database is updated. Keep in mind that the keyword INST_ is only keyed once for the entire group of institutions.

  Because the data in an entry for a new name will be used to establish the new Code and its translation, the format of the proposed new name should follow as much as possible the guidelines for Institutions found in the Attachment 3 to Section V.

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f. Historical Background of Entries in *Source Directory*

The use of the *Source Directory* quickly reveals some inconsistencies in entries which require explanation:

- **Variations in the Abbreviations of the Names of States**

  When the Source Authority List for Institutional names was originally established, the abbreviations used for states and territories of the United States were based on the standard abbreviations then in use. Later when two-character postal abbreviations came into being, ERIC adopted their use; however, names with the old abbreviations were not changed.

  The Codes with the older abbreviations, however, are still valid and should be used.

- **Variations in Source Code Prefixes**

  When the Source Authority List was initially compiled, individual Source Code prefixes were created for each state and country along with some special prefixes to designate Federal government agencies (e.g., FGK designated Washington, DC; JIM, Illinois; CIQ, California; SFO, Ontario). With over 100 Codes added each month, creating new Codes using these specific designations was labor intensive and the special prefixes were abandoned in the early 1970s. All new Codes are now assigned simply in sequential order using the "BBB" prefix; the sole exception is the "EDD" prefix which was created in 1982 to facilitate computer retrieval of Department of Education documents.

  Although the Codes with the special prefixes are still valid, if a cataloger finds two similar names, one with a special prefix and one with a "BBB," it is likely that the "BBB" Code is the later and more accurate name.

  In the case of Department of Education Codes, the EDD prefixed Codes MUST be assigned; do not use the older names with BBB prefixes. The older BBB prefixed Codes are still in the Authority List because the records in the database master file still contain Codes with those prefixes.

SUMMARY OF SIGNIFICANT RULES

1. The Institution data element identifies the organization having responsibility for the intellectual creation of the document. Multiple responsible institutions may be cited, each in its own subfield.

2. All Institution names used must agree with the standard established name forms cited in the ERIC *Source Directory*. Existing names are entered by means of Codes representing the name in the ERIC *Source Directory*.

3. If the Institution name is new and not previously established, it should be formatted generally in accordance with the *Guidelines for Descriptive Cataloging of Reports*. Section 2: Corporate Author (**see Attachment 3**). All standardized names are based on the pattern: largest element-geographic location-smallest element.

4. Responsible institutions should not be confused with the corporate affiliation of the Personal Author or with the Sponsoring Agency.

5. Institutional names should use the standard two-character postal codes for states.

6. When dealing with organizations of modest size, it is generally not necessary to establish subdivisions.

7. When requesting that new institutional names be established, the Clearinghouses must provide complete location information (if not apparent on the document).

8. Approved abbreviations for the generic parts of institutional names (e.g., institute, company, etc.) are listed in Attachment 3. First words of Institution names, however, may never be abbreviated.

9. Entries in the Contract Number field or in the Sponsoring Agency field imply the existence of a preparing institution. The Institution field should, therefore, generally be cataloged when data are present in these fields.

10. The Department of Education and its units have Codes beginning with the prefix "EDD" and names with corresponding Codes should be used instead of the older forms beginning with "BBB."

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EXAMPLES

ONE INSTITUTION (Listed in *Source Directory*)	BBB21707=Cato Inst., Washington, DC.
ONE INSTITUTION (New, Not Listed in *Source Directory*)	=Columbus Citizens to Improve Education, OH.
TWO INSTITUTIONS (Both Listed in *Source Directory)*	BBB21707=Cato Inst., Washington, DC.; JIM13950=Chicago Public Schools, Ill.
TWO INSTITUTIONS (Both New)	=Maryland State Dept. of Education, Annapolis. Dept. of Research and Evaluation.; =Maryland State Dept. of Mental Health, Annapolis.
TWO INSTITUTIONS (One Listed in *Source Directory*; One New)	FGK56700=National Education Association, Washington, D. C.; =Ohio State Literacy Council, Columbus.

B.13 ISSUE (OF ABSTRACT JOURNAL)

Profile

Data Element/Field	- Issue (of Abstract Journal)
Data Entry Tag/Keyword	- ISS_
Files	- RIE/CIJE
Mandatory/Optional	- Mandatory
Data Provided By	- Facility/CIJE Publisher
Character Set	- Alphabetic, Numeric
Subfields Permitted	- No
Field Length	- 8 (fixed length)
Field ID No. (Tape)	- 43

TYPICAL ENTRY (RIE) ISS_RIEAPR92

TYPICAL ENTRY (CIJE) ISS_CIJAPR92

This field contains data identifying the specific RIE or CIJE journal issue in which the record was originally announced. The field is assigned by the computer at the Facility or CIJE Publisher in the following format:

Eight (8) characters arranged in the order as cited:

Journal (3) - Month (3) - Year (2), as shown in the "Typical Entries."

NOTE: In the early years of the database, the field varied as to format and was not a validated field.

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B.14 JOURNAL CITATION

Profile

Data Element/Field	- Journal Citation
Data Entry Tag/Keyword	- JNL_
Files	- RIE/CIJE
Mandatory/Optional	- Mandatory (CIJE); Optional (RIE)
Data Provided By	- Clearinghouse
Character Set	- Alphabetic, Numeric, Special
Subfields Permitted	- Yes (Normal Entry Requires 2)
Field Length	- RIE: 49 (Avg.); 252 (Max.); CIJE: 47 (Avg.); 252 (Max.)
Field ID No. (Tape)	- 50

TYPICAL ENTRY JNL_American School Board Journal; v178 n8 p39-41 Aug 1991

a. General

Journal articles are independent writings appearing in serials. The Journal Citation field is used to record the bibliographic data for the serial publication in which an article appears. In addition, the field is also used to record serial information when a complete issue or run of a journal is entered in the database (usually RIE). The following discussion first describes the features generic to data in both RIE and CIJE. Because there are differences in journal/serial coverage between CIJE and RIE, the procedures for each are then individually described.

b. Citation Format

The format for data in the Journal Citation field should be:

Journal Title (unabbreviated) in the first subfield, followed by the identification for the journal issue and the article location in the second subfield. Usually the second subfield will consist of volume number, issue number, inclusive pagination, and date of publication, in that order:

EXAMPLE: Any journal title; v1 n1 p2-13 Apr 1992

The Journal Citation field should not end in a period. However, journal issues identify themselves in a great variety of ways and the second subfield should express that identification in whatever terms are necessary. (See the Examples at the end of this discussion for various non-routine forms.) The second subfield should always end with the four-digit year of publication. In CIJE, in order to avoid redundant cataloging, this data is used by the computer program automatically to construct a Publication Date (PDAT) field (see discussion under that data element).

The Journal Title should be entered in full unabbreviated form, with the exception of initial articles (e.g., "The"), which are dropped[16]. The Journal Title subfield must always be followed by a semicolon (the standard subfield delimiter).

c. Abbreviations and Conversions

The journal article location data in the second subfield should appear as shown in the Examples. The common abbreviations used are as follows:

v = volume
n = number
p = pages

pt = part
suppl = supplement
spec iss = special issue

Spr = Spring
Sum = Summer
Fall = Fall
Aut = Autumn
Win = Winter

There should not be any space between the v, n, p abbreviations and the numbers to which they apply.

Months of the year should be abbreviated to the standard 3-character representations: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec. The year should always be entered with the century included (e.g., 1991, 1992).

Volume and issue information expressed in Roman numerals should be converted to Arabic in the citation.

The inclusive pagination statement should, in certain situations, drop initial repetitive digits in the figure for the last page. This is done for reasons of space economy, but is avoided below "100" and whenever the article spans from any given hundred range to the next. The conventions to be observed are illustrated in the following examples:

p5
p1-10
p11-14,72-73
p111-14,172-73,401-06
p111-210
p1120-22
p1200-301
pA98-A99
p102s-03s

There is no space after the commas when there is a series of numbers. When the item being entered is an entire issue of a serial, it is not necessary to specify inclusive pagination, as is appropriate for a single article.

NOTE: Current CIJE practice is to specify inclusive pagination for all records, including entire issues (see Examples).

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[16] Through 1970 (the first four years of RIE and the first two years of CIJE) journal titles were abbreviated according to ANSI Standard Z39.5 "Periodical Title Abbreviations." Subsequently, the full journal title was utilized.

d. Journal Articles in CIJE

In ERIC, the great majority of journal articles are entered in the CIJE (*Current Index to Journals in Education*) portion of the ERIC database. These articles are primarily taken from journals covered either comprehensively or selectively by specific Clearinghouses; a list of these journals may be found in the *Source Journal Index* printed in every issue of CIJE. In addition, from time to time Clearinghouses process articles known as "oneshots" (from journals not regularly covered in CIJE, but in which a specific issue has education-related articles, e.g., *Newsweek*).

(1) Validation of Journal Titles

The CIJE Publisher produces an authority list (*Source Journal Index*) of regularly covered journals citing the approved journal titles (the most recent update appears in each monthly issue of CIJE). For journals not on this list, consult *Ulrich's Guide to Periodicals*. All incoming CIJE journal titles are validated by the computer at the CIJE Publisher against the *Source Journal Index* which is the CIJE Authority List. Titles of journals not validated appear on an exception report which is reviewed by the CIJE editors; if a title is not listed as a "oneshot" and is not a variant of a title in the *Source Journal Index*, the Clearinghouse is contacted for the correct title.

(2) Validation of Citation Format

The computer program at the CIJE Publisher checks to be certain that the citation data (volume, number, pagination, and date) are present and in the proper format and sequence.

(3) *Source Journal Index* (SJI)

The *Source Journal Index* (SJI), used as the CIJE Authority List, is created from information provided by ERIC Clearinghouses when they indicate to the CIJE Publisher that they will be regularly covering a specific journal. (Clearinghouses periodically receive a copy of their input from the SJI to review and, if necessary, update.) Clearinghouses are expected to supply the following information for all entries in SJI:

- Journal Title;
- Frequency of publication (e.g., monthly, quarterly);
- Price (e.g., annual subscription, single copies, foreign prices);
- Reprint availability through UMI;
- Reprint availability, in lieu of, or in addition, to UMI (include complete address and price);
- Complete subscription address;
- Coverage of journal (e.g., comprehensive or selective) [Comprehensive = each issue indexed cover-to-cover will be indicated by an asterisk in the SJI following the Clearinghouse acronym; selective = each issue is reviewed regularly and education-related articles selected when merited]; and

- ISSN Number (this may be located on the cover, title page, or verso of the table of contents); if unable to locate, check the entry in *Ulrich's*. If no ISSN exists, this situation should be indicated by adding "No ISSN available." ISSN Numbers need not be cataloged in CIJE entries (except for "oneshot" journals) because the CIJE computer system extracts them from the SJI and inserts the proper ISSN in each record.

(4) "Oneshot" Articles

Whenever a Clearinghouse decides to process a journal on a "oneshot" basis (a journal not covered comprehensively or selectively), the CIJE Publisher needs to be able to distinguish these "oneshot" items from articles coming from regularly covered journals. This facilitates the validation process against the *Source Journal Index* Authority File. This information must, therefore, be recorded at input time. The information is, however, not useful to end users and will be eliminated from the CIJE announcement and from the ERIC Master File. The format for entering this information is:

JNL_Wisconsin Law Review; v95 n4 p1105-19 Feb 1991; oneshot

The word "oneshot" in the third subfield of the example above is used for internal processing purposes, but is deleted prior to the Master File update and publication. Note that the word "oneshot" should be separated from the rest of the entry by a semicolon. ***NOTE:*** *Publisher availability information for oneshots should be entered in the Note field and the ISSN added to each resume.*

e. Journal Articles, Journal Issues, and Journal "Runs" in RIE

RIE was designed to include documents; CIJE was designed to include journal articles. This distinction should generally be observed. It follows ERIC's own product descriptions. The users expect to find the database subdivided as described.

(1) Journal Articles

Therefore, journal articles may not be announced in RIE if they have been, should have been, or will be announced in CIJE. However, journal articles may be entered in RIE if they meet certain special criteria, e.g.:

- a single older "classic" or high quality article, from a serial not covered by CIJE at the time of original publication; no longer eligible for CIJE because of its age (several years after original publication), but highly relevant to ERIC and a desirable addition to the database; reproduction release obtained.

- an article reprinted between new covers as a technical report (or as part of a report) for which a reproduction release has been obtained; not previously covered by CIJE or containing additional material in its new form.

- a significant article (for which reproduction release has been obtained) appearing in a journal or serial not covered by CIJE and sufficiently obscure that it could not be expected to be found in conventional library systems.

If a Clearinghouse discovers that a journal article in its scope was overlooked in a journal regularly covered by another Clearinghouse, there is no prohibition against the first Clearinghouse submitting the missing article to CIJE as a "oneshot."

Journal articles in RIE input are checked by the Facility against the *Source Journal Index* (SJI). If the title is found in SJI, the item is removed from processing and returned to the Clearinghouse. If the title is not found in SJI, but is determined to have UMI availability or to have a circulation of significant size (several thousand), then it is also removed from processing and returned to the Clearinghouse for consideration as a "oneshot." In no circumstances may a journal article be submitted for RIE at Level 3, since Level 3 is the equivalent of CIJE processing.

(2) Journal Issues

CIJE processes material at the article level. RIE processes material at the monographic level. In the case of a "theme" issue of a journal, in which all articles in the issue deal with a single unified topic, and which can be treated as if it were a report or monograph on the theme subject, it is best to process such an item in RIE (assuming reproduction permission can be obtained). Journal issues that are not theme issues should be processed at the article level in CIJE.

(3) Journal "Runs"

If a serial publication is relatively rare or obscure or very specialized, is not available from UMI, and it is unlikely that it would be subscribed to by very many university/college libraries, then RIE processing (with its archival microfiche process) should be considered as a useful way to make the serial available to users. In such cases, it is essential that reproduction permission be obtained (otherwise RIE provides no advantage over CIJE) and that at least a year's worth of the serial comprise the accession (in order to avoid the proliferation of clone-like entries).

(4) Compendiums of Journal Articles/Columns/Features

Regularly appearing journal columns or features often have a unit of subject-matter (e.g., Valentine Day projects) that argues for their being grouped together as one item. This kind of accession became popular during the Practice File Pilot Project and continues to be a viable option. A body of material from several serial issues (perhaps even a year's worth) is assembled and treated as if it were a monograph on a single topic. It is essential in such cases that reproduction permission be obtained and processing take place at Level 1 or 2, otherwise the material has not really been brought together and there is little value in putting it in RIE instead of its normal home, CIJE.

(5) Reprints and "To Be Published" Articles

Documents for RIE sometimes contain notations that they are reprints of a published journal article or that they will be published in the future. In the case of reprints, the Journal Citation field should be completed if the document is the actual reproduction of a published article and contains the page numbers, journal title, and other citation information which can be verified. (Journal citations are best omitted from documents which only give a brief notation of journal publication, since the citation cannot be verified.) Statements of future publication (e.g., "*submitted to ...Journal*"; "*to appear in...Journal*," etc.) should be ignored in cataloging as there is no guarantee if or when such publication will occur.

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f. Theme Titles of Theme Issues of Journals (in RIE and CIJE)

The theme titles of theme issues of journals should be cataloged in the Title field (if the entire issue is the accession, as it generally is in RIE) or the Note field (if an article from the theme issue is the accession, as it generally is in CIJE).

g. Dual Coverage (Articles in CIJE; Issue Runs in RIE)

Although under normal circumstances, an item is entered either in CIJE or RIE, on occasion dual coverage may be desirable. For example, individual journal articles may be entered as "oneshots" in CIJE; if these articles are from a journal with limited availability (not UMI or another large reprint service), then a year's worth or more of the journal may be grouped together and archived as one accession in RIE.

SUMMARY OF SIGNIFICANT RULES

1. If the item being cataloged is a journal article or an issue of a serial publication, the Journal Citation field must be completed.

2. An entry in the Journal Citation field of RIE requires the cataloger to make a corresponding entry of code 080 (Journal Article) or 022 (Serial Issue) in the Publication Type field. However, in CIJE processing the computer automatically assigns Publication Type code 080 to all CIJE records.

3. Journal Title should be entered in unabbreviated form, with the exception that initial articles are dropped (e.g., The Atlantic Monthly = Atlantic Monthly). Use the *Source Journal Index* as the authority for all approved journal names. (If in doubt about the correct way to cite a new Journal Title, use the standard periodical reference *Ulrich's Guide to Periodicals.*) Journal Titles are entered as the first subfield of the field.

4. Information concerning the location of the article within the journal is entered in the second subfield. Certain abbreviations are permitted in this subfield for standard words such as Volume, Number, Pages, etc., and for inclusive pagination containing repetitive digits.

5. The standard format for article location information is "v12 n34 p56-78 Jan 1989." For variations on this basic format caused by complex journal publishing patterns, see the "Examples." Do not end the Journal Citation field with a period.

6. When the item being entered is an entire issue of a serial, it is not necessary to specify inclusive pagination, as is appropriate for a single article.

   Exception: CIJE treats inclusive pagination as mandatory.

7. "Theme" titles applicable only to unique single issues of journals should not be considered Journal Titles, but should be cataloged in the Title field (if the entire issue is the accession) or the Note field (if an article in the theme issue is the accession).

8. "Oneshot" journal articles should be identified by having the word "oneshot" entered in the third subfield of the Journal Citation. It will be used for internal processing needs, but will later be deleted from the journal announcement and from the Master Files.

9. With some exceptions, articles from journals and other serials as a rule are to be announced only in CIJE.

EXAMPLES

• **Acronymic Journal Title**	ELT Journal; v46 n1 p81-91 Jan 1992
• **Continuing Pagination**	Parks and Recreation; v26 n10 p30-37,72 Oct 1991
• **Date Spans Months and Years**	Community, Technical, Junior College Journal; v62 n3 p21-24 Dec-Jan 1991-92
• **Day of Month Given**	Chronicle of Higher Education; v38 n16 pA31-32 Dec 11 1991
• **Distinguishing Two Journals with Identical Titles**	Adult Education Adult Education (London)
• **Entire Issue Entered as One Accession***	Nurse Educator; v27 n2 May 1992 [NOTE: CIJE treats inclusive pagination as mandatory and would incorporate total journal pagination in the above example.]
• **Issue Covers Multiple Months**	Public Libraries; v20 n6 p350-37 Nov-Dec 1991 [NOTE: The form "Nov-Dec" should be used in lieu of "Nov/Dec."]
• **Journal Title in All Capitals**	CAUSE/EFFECT; v143 n4 p25-29,33-34 Win 1991
• **Journal Title with Partial Capitals**	CD-ROM Professional; v5 n1 p49-54 Jan 1992
• **Journal Title/Subtitle Combination**	Language and Education: An International Journal; v2 n4 p229-38 1988
• **Multi-Language Title**	International Review of Education/Internationale Zeitschrift fuer Erziehungswissenschaft/Revue Internationale de Pedagogie; v37 n2 211-26 1991
• **Multiple Numbers Assigned to One Issue**	Sex Roles: A Journal of Research; v25 n9-10 p511-20 Nov 1991
• **No Month in Date**	Journal of Education; v173 n1 p91-106 1991
• **Non-English Journal Title**	Infancia y Aprendizaje; v54 p41-47 1991
• **Number Only, No Volume**	Bulletin of the Council for Research in Music Education; n109 p37-45 Sum 1991
• **Oneshot Article (CIJE Only)**	American Heritage; v41 n8 p76-79,81-83 Dec 1990; oneshot
• **Part in Lieu of Number**	British Journal of Educational Psychology; v60 pt5S p26-32 Feb 1990
• **Reports, Occasional Papers, Working Papers, etc. Issued with Volume and/or Number (RIE Processing)**	TITLE_Estimates of Enrollment at Potomac College, 1991-92. JNL_PC Administrator's Report; v23 n3 Fall 1991

• **Run (A Year or More) of a Serial***	TITLE_Center Stage: A Platform for the Discussion of Teaching/Learning Ideas. Volume 1, Numbers 1-8, 1990-91. JNL_Center Stage; v1 n1-8 1990-91
• **Scattered Issues Combined (by Clearinghouse) into One Accession***	Higher Education Review; v22 n1,3,7 Jan,Mar,Jul 1990
• **Scattered Issues (Spanning Years) Combined (by Clearinghouse) into One Accession***	Higher Education Review; v20 n1,3 Jan,Mar 1989 v21 n2,6 Feb,Jun 1990*
• **Series Designation in Lieu of Volume**	Current Population Reports; Series P-27 n52 Sep 1989
• **Special Issue (in lieu of volume/number)**	Connections; spec iss 2 p7-9 Sep 1988 Educational Journal; v23 spec iss Jan 1989*
• **Supplement**	Counselor's Information Service; v43 n2 suppl 2 p20-25 May 1988
• **Theme Issue***	Theme Issue, Individual Articles Entered
CIJE	TITLE_Education in Brazil. JNL_International Education; v46 n3 p25-45 Fall 1991 NOTE_Theme Issue: "South American Education Today."
RIE	Theme Issue* TITLE_South American Education Today. JNL_International Education; v46 n3 Fall 1991 [NOTE: Entire issue, no pagination necessary in Journal Citation.]
• **Unusual Journal Title**	RE:view; v23 n1 p35-40 Spr 1991
• **Volume Only, No Number**	Kentucky English Bulletin; v41 p450-65 Fall 1991
• **Year Given as Span of Years**	Adolescence; v16 n2 p10-15 1991-92 [NOTE: The form "1991-92" should be used in lieu of "1991-1992."]
• **Year Run of Serial Combined (by Clearinghouse) into One Accession***	Connect; v13 n1-4 Jan-Dec 1988

*Entire issues of serial publications (e.g., theme issues), or several issues grouped together (e.g., newsletter run), as one accession, are usually only processed in RIE. Entries in CIJE are for individual journal articles, not entire issues or groups of issues.

B.15 LANGUAGE

Profile

Data Element/Field	- Language
Data Entry Tag/Keyword	- LANG_
Files	- RIE/CIJE
Mandatory/Optional	- Mandatory (If left blank, the computer inserts "English")
Data Provided By	- Clearinghouse
Character Set	- Alphabetic
Subfields Permitted	- Yes (Up to 5)
Field Length	- 46 (Max.); 7 (Avg.)
Field ID No. (Tape)	- 76

TYPICAL ENTRY

LANG_English; Spanish

a. General

The purpose of this field is to permit searchers to restrict their output to materials in the language(s) they can utilize.

The language of the document is to be entered in the form of the full text of the name of the language. A "Language Authority List" of the principal language names to be used is displayed in **Figure V-11**. These names correspond in format to those appearing in the ERIC *Thesaurus* or *Identifier Authority List*, both of which may also be used as authority lists for this data element.

If the document is entirely in the English language, however, this field should be left blank. The computer program will automatically write "English" in this field if it is left blank and no foreign language is entered. The purpose of this "default-to-English" is to save the Clearinghouses data entry time, since the vast majority of ERIC accessions are English-language documents.

If the document is in English and in one or more other languages, "English" must be added to the field along with the other language(s). Non-English documents carrying English abstracts (or abstracts in any language other than the text) should not be considered to be English language (or abstract language) documents. An abstract alone should not be used to determine the language of the document.

Documents that are instructional texts in one or more languages present a special problem. Typically such documents are basically in English, but many contain large amounts of material in the language being taught (usually in the form of examples or passages to be read). Such a document generally should be cataloged as in the language of its basic instructional text. The examples or illustrative passages in a language-teaching document are not the basic instructional text of the document and do not contain its "message." They would be meaningless without the accompanying text. As a rule, therefore, language-teaching documents should not be cataloged as if they were actually in the language being taught. The language being taught will rather be indexed as the subject of the document. Documents with large amounts of non-English text may, however, constitute an exception to this general rule.

The language of a document is its vehicle of communication and should not be confused with a language that is a subject of a document. A language being treated as a subject is indexed in the Descriptor field or Identifier field.

b. Historical Background of Field

This data element was added to the file beginning with the January 1979 issues of *Resources in Education* (RIE) (ED 157 988) and *Current Index to Journals in Education* (CIJE) (EJ 186 218). Prior to that time the language of the document was noted in unstructured, narrative form in the Note field, a practice that has been discontinued.

- Afrikaans
- Albanian
- Aleut
- Arabic
- Armenian
- Assyrian
- Athapascan
- Belizean Creole
- Bengali
- Cambodian
- Chinese
- Choctaw
- Cree
- Czech
- Danish
- Dari
- Dibabawon
- Dutch
- Edo
- English
- Ewe
- Finnish
- French
- Fulani
- German
- Greek
- Guarani
- Haida
- Haitian Creole
- Hausa
- Hawaiian
- Hebrew
- Hindi
- Hmong
- Hualapai
- Huichol
- Hungarian
- Hupa
- Igbo
- Ilocano
- Indonesian
- Inupiaq
- Irish
- Italian
- Japanese
- Jukun
- Kabiye
- Kalinga
- Kanuri
- Karuk
- Khowar
- Kiribati
- Kituba
- Korean
- Kpelle
- Lao
- Latin
- Malay
- Malayalam
- Mandingo
- Mandinka
- Mano
- Marathi
- Mende
- Mohawk
- Muskogee
- Navajo
- Nepali
- Norwegian
- Ojibwa
- Palauan
- Panjabi
- Passamaquoddy
- Persian
- Pima
- Polish
- Portuguese
- Pulaar
- Quechua
- Rumanian
- Russian
- Samoan
- Seminole
- Seneca
- Serbocroatian
- Setswana
- Singhalese
- Siswati
- Soninke
- Spanish
- Susu
- Swahili
- Swedish
- Tagalog
- Thai
- Tlingit
- Turkish
- Ukrainian
- Vietnamese
- Wolof
- Yoruba
- Yupik
- Yurok

FIGURE V-11: Language Authority List[17]

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[17] This list reflects only those languages already represented by documents in the database. It is updated as new languages are indexed.

SUMMARY OF SIGNIFICANT RULES

1. Documents in non-English languages (or in English and non-English languages) must have the names of those languages entered in this field (up to a limit of five).

2. If a document is entirely in the English language, this field should be left blank. The computer will then insert the word "English" by default.

3. Documents that are instructional texts in a given language generally should not be described as in the language being taught.

4. The names of languages are entered in their full textual form and must agree with the form of the name found in the Language Authority List, in the ERIC *Thesaurus* or *Identifier Authority List*. [However, do not subdivide languages, e.g., Arabic (Egyptian).]

EXAMPLES

DOCUMENT IN ENGLISH	Field to be left blank
DOCUMENT IN A LANGUAGE OTHER THAN ENGLISH	French
DOCUMENT IN MULTIPLE LANGUAGES (one of which is English)	English; Spanish; French; German; Russian [NOTE: Language names need not be entered in any particular order.]

B.16 LEVEL OF AVAILABILITY (AT EDRS)

Profile

Data Element/Field	- Level of Availability (at EDRS)
Data Entry Tag/Keyword	- LEVEL_
Files	- RIE Only
Mandatory/Optional	- Mandatory
Data Provided By	- Clearinghouse
Character Set	- Numeric (1, 2, or 3)
Subfields Permitted	- No
Field Length	- 1 (fixed length)
Field ID No. (Tape)	- 40

TYPICAL ENTRY (RIE ONLY) LEVEL_2

a. General

Documents are entered into the ERIC database and announced in RIE at one of three levels of availability, which determines whether and to what extent they can be reproduced by the ERIC Document Reproduction Service (EDRS). (These levels, in turn, are based on the copyright status of the document, the legibility of the document, and the kind of release granted by the copyright holder.)

Level	Definition
1	Available from EDRS in both microfiche (MF) and paper copy (PC).
2	Available from EDRS in other than paper copy.
3	Not available from EDRS.

Discussion and material pertaining to copyright and reproduction release appears in detail elsewhere in the EPM (Sections II, III, and IV, see Indexes) and will not be repeated in its entirety here.

The Level field is mandatory and its existence, along with the mandatory Pagination field, is necessary in order for the computer program to generate the EDRS Price field. Each of the three Level Codes generates a different type of statement, e.g.:

Level 1 — MF01/PC01 Plus Postage.
Level 2 — MF01 Plus Postage. PC Not Available from EDRS.
Level 3 — Document Not Available from EDRS.

For further information on the MF and PC codes, see the discussion under EDRS PRICE in Section V.

b. Level 1 Documents (Available from EDRS in Both MF and PC)

Documents announced in Level 1 fall into one of the subclasses, as described below:

- *Document Not Copyrighted*

  These are documents that:

  — have been produced, sponsored, or funded by the Federal Government (and therefore are in the public domain), or

  — specifically waive copyright or reproduction rights (waiver appears on the document itself).

  Documents falling into one of the above categories should not have the Reproduction Release stickers, referred to in the next paragraphs, affixed to the documents.

- *Document Copyrighted: Full Release Obtained*

  All documents not falling into one of the two circumstances above are presumed to be copyrighted and thus the Clearinghouse must have a reproduction release from the copyright holder granting permission for ERIC to reproduce the document. Such documents must have a release statement, including the copyright holder's name, affixed in the form of a sticker to the title page or cover, as follows:

"PERMISSION TO REPRODUCE THIS
MATERIAL HAS BEEN GRANTED BY

____

____

TO THE EDUCATIONAL RESOURCES
INFORMATION CENTER (ERIC)."

NOTE: *Blank stickers are supplied by the ERIC Facility upon request. Details on their use are covered in EPM Section IV.*

The purpose of these stickers is to alert users and purchasers of the microfiche and paper copy that permission to reproduce has been granted to ERIC and that if further reproduction is desired, they must contact the individual or organization granting the release.

- *Government Printing Office (GPO) Documents*

  These documents are announced at Level 1 to ensure continued availability after they go out of print at GPO. GPO is cited in the Availability field as an alternative availability, when appropriate. Do not affix Reproduction Release labels to these documents.

- *Department of Education (e.g., OERI, NCES, etc.) Documents*

  All documents produced, funded, or sponsored under the auspices of the Department of Education, or any of its subdivisions, should be entered at Level 1. Included under this Level 1 requirement are all ERIC Clearinghouse publications, unless special permission has been granted to process at Level 2. Because these documents are Federally funded, do not affix a Reproduction Release label.

c. Level 2 Documents (Available from EDRS in MF Only)

Documents announced at Level 2 fall into one of three subclasses, as described in the following paragraphs. When possible, a non-ERIC source for original copies or paper reproductions should always be cited for Level 2 documents.

- *Document Copyrighted; Limited Release Obtained.*

  These are copyrighted documents for which the Clearinghouse has received a release from the copyright holder granting permission for ERIC to reproduce the document in other than paper copy.

  Such documents must have a release statement, including the copyright holder's name, affixed in the form of a sticker to the title page or cover, as follows:

> "PERMISSION TO REPRODUCE THIS MATERIAL IN **OTHER THAN PAPER COPY** HAS BEEN GRANTED BY
>
> ____________________________
>
> ____________________________
>
> TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

NOTE: Blank stickers are supplied by the ERIC Facility upon request.
Details on their use are covered in EPM Section IV.

- *Documents of Marginal (But Acceptable) Reproduction Quality*

  Documents of marginal legibility may also be documents that, for various reasons, are nevertheless desirable to accession into the ERIC system. Level 2 input may often be the best solution in such cases, and Clearinghouses should not hesitate to use this Level, where appropriate, even if the document was released at Level 1. A microfiche achieves preservation of a basic and important record at relatively low cost whereas the much higher cost (to the user) of a paper copy reproduction requires a correspondingly higher level of legibility in order to be publicly acceptable as a commercial product. Examples of items in this category might be:

- — PRIORITY Documents received from the ERIC Facility bearing the stamp **"Best Copy Available"**;
- — ROUTINE documents of marginal physical quality, but classed by the selection criteria as mandatory input, e.g., ERIC Clearinghouse publications;
- — ROUTINE documents judged to be superior in overall content, but also with legibility/reproducibility defects that would result in poor paper copy reproduction, e.g., Congressional hearings.

In all such cases, a brief explanatory note stating the reproducibility problem should be added to the Note field.

- *Special Arrangements (with Document Contributors)*

ERIC has a number of blanket releases for Level 2 processing with certain organizations engaged in selling their own publications. For example, all National Education Association (NEA) publications (which are sold by NEA in original copies) may be announced only at Level 2. These organizations are persuaded that there is a benefit to them in their documents being in the ERIC database and that entry at Level 2 will not interfere with their own sales efforts. All such organizations must be cited as sources of availability for paper copy. For a list of these arrangements see the *ERIC Acquisitions Arrangements List* which is published annually by the ERIC Facility.

d. Level 3 Documents (Not Available from EDRS)

Level 3 documents are copyrighted documents (or documents whose reproduction has otherwise been limited or controlled) for which no reproduction release has been obtained. If a document is announced at Level 3, an alternative source must be cited in the Availability field. Level 3 documents formerly created a gap or hole in the ERIC microfiche collection. Beginning with the January 1989 RIE, this gap is being filled with a "dummy" microfiche containing only the Single Frame Resume for the document. At the present time, Level 3 input to ERIC amounts to less than 3% of total input.

SUMMARY OF SIGNIFICANT RULES

1. All documents entered into RIE must be assigned a Level of Availability code.
   - Level 1 — Available from EDRS in both microfiche (MF) and paper copy (PC).
   - Level 2 — Available from EDRS in other than paper copy.
   - Level 3 — Not available from EDRS.
2. The Level assigned to a document can be no higher than that given in the Reproduction Release label affixed to the front to the document. (Generally the two will agree, but occasionally a document released at Level 1 must nevertheless be assigned Level 2 because of legibility problems.)
3. GPO documents are to be assigned Level 1 (unless legibility problems dictate Level 2).
4. Documents produced, funded, or sponsored by the Department of Education or its subdivisions are to be assigned Level 1 (unless legibility dictates Level 2).
5. Documents of marginal paper copy reproduction quality should be assigned Level 2.
6. Level 2 documents should have, if known, a statement concerning paper copy availability added to the Availability field.
7. Level 3 documents must have an entry in the Availability field informing the user how a copy can be obtained.
8. The Level cited on the RIE resume, the shipping log, and the release sticker on the document should be consistent (unless document legibility problems lead to a Level 2 re-assignment where permission was granted originally for Level !).
9. Documents considered to be in the public domain (i.e., produced by Federal funds) should not have a Reproduction Release sticker affixed to them.

B.17 NOTE

Profile

Data Element/Field	- Descriptive Note
Data Entry Tag/Keyword	- NOTE_
Files	- RIE/CIJE
Mandatory/Optional	- Optional
Data Provided By	- Clearinghouse
Character Set	- Alphabetic, Numeric, Special
Subfields Permitted	- No
Field Length	- RIE: 600 (Max.); 56 (Avg.); CIJE: 570 (Max.); 86 (Avg.)
Field ID No. (Tape)	- 38

TYPICAL ENTRY

NOTE_Paper presented at the Annual Meeting of the National School Boards Association (51st, San Francisco, CA, April 13-16, 1991).

a. General

The Descriptive Note field is a catch-all field intended to contain cataloger's notes that extend the description of the document or journal article and communicate miscellaneous information essential to the user. If a cataloger wishes to communicate any information not provided for by the other fields, it is entered in this field.

While Notes are wide-ranging in content, there are nevertheless certain recurring situations usually requiring notes:

- Papers presented at..., Speeches, Reprints, etc. (the circumstances under which the document was prepared or presented);
- Dissertations, Theses, Practicum Papers (type of degree, granting institution);
- Related Documents ("For related documents, see...");
- Analytics;
- "In" notes, for papers extracted from collections and entered individually;
- Extracts, Summaries, Derivations from Larger Documents;
- Documents with Legibility/Reproducibility Problems;
- Copyrighted Segments of Documents;
- Translations ("Translated by...");

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- Miscellaneous Data (e.g., Prepared by...Committee; Funding also provided by...);
- Use of Note Field in CIJE (e.g., Journal availability information for obscure journals).

b. **General Guidelines**

The Note field can be used to capture a wide assortment of data not recorded elsewhere in the resume. The discussion which follows highlights only the primary uses of the field. Although there is an array of data found in the field, some conventions, such as in recording conference papers, have been established. The basic guidelines for all data in the field are:

- All characters in the ERIC Character Set may be used.
- Entries should be brief and succinct, but in accordance with English usage.
- Punctuation should be in accordance with the normal rules of English usage, e.g., independent thoughts should be separated with a period; semicolons may be used to separate closely related thoughts.
- ED and Clearinghouse Accession Numbers are to be entered in specific formats and always prefixed with the ED or Clearinghouse Prefix:

Single Numbers

Correct:	ED 123 456; CE 123 456
Incorrect:	ED123456; ED 123,456; ED-123-456 CE123456; CE 123,456; CE-123-456

Unbroken Range of Numbers

Correct:	ED 123 456-475 CG 123 456-475
Incorrect:	ED 123 456 - ED 123 475 ED 123 456 - 75 CG 123 456 - CG 123 475 CG 123 456 - 75

Broken Range of Numbers

Correct:	RC 020 123 and RC 020 125
Incorrect:	RC 020 123, 125

Never compress when the series has gaps.

- The field always concludes with a period.

c. Conference Papers, Speeches, etc.

Conference number, place, and date should always be placed in parentheses, in the standardized format shown below, after the conference name. Domestic (i.e., United States) meeting locations should be cited using the standard two-character postal codes for states. Foreign meeting locations should always cite the country and city. Locations are restricted to city, state, and country; do not include the names of universities, colleges, convention sites, etc., as part of the location.

Conference information is not limited to that found on the document itself. Typically Clearinghouses solicit a conference and enter many papers from that conference; papers may lack any or all information concerning the conference location, dates, etc. If known by the Clearinghouse, the Note field should include a complete citation for a conference. [It is not necessary to submit verification documentation to the Facility for conference information.] Abbreviations of the names of the entity holding the conference should not be used unless the "translation" of the abbreviation is not known.

Examples:

—Complete Conference Information

NOTE_Paper presented at the Annual Meeting of the Eastern Psychological Association (62nd, New York, NY, April 11-14, 1991).

—Number or Location or Date of Conference Not Known

NOTE_Paper presented at the Annual Indiana Reading Conference (Indianapolis, IN, April 26, 1991).

[The number of the conference is usually the information that is unknown.]

—Revision of a Conference Paper

NOTE_Revised version of a paper presented at the Conference on the Effects of Structural Change on Employment and Education (Washington, DC, June 14-17, 1989).

—Speech

NOTE_Speech presented at the Annual Meeting of the College English Association (San Antonio, TX, April 18-20, 1991).

—Reprint

NOTE_Reprint from Proceedings of the Annual Conference of the American Sociological Association (Toronto, Ontario, Canada, August 24-28, 1981).

—Dual Presentations of Same Paper

NOTE_Paper presented at the Meetings of the International Communications Association Telecommunications Conference '81 (Washington, DC, June 1, 1981) and the Oregon Association of Broadcasters (Newport, OR, June 12, 1981).

—Combined or Joint Meetings

NOTE_Paper presented at the combined Annual Meeting of the Midwest Popular Culture Association and the Midwest American Culture Association (Kalamazoo, MI, October 23-25, 1980).

d. Dissertations, Theses, Practicum Papers, Research Papers, Exit Projects

All such notes should be as brief as possible. If a university has several campuses, then a specific location should be cited if found on the document.

Examples:

NOTE_Ph.D. Dissertation, University of Illinois at Urbana-Champaign.

NOTE_Ed.D. Dissertation, Temple University.

NOTE_Doctoral Dissertation, University of Maryland, Baltimore.

NOTE_Ed.D. Practicum, Nova University.

NOTE_Master's Thesis, Yale University.

NOTE_M.L.S. Thesis, Indiana University.

NOTE_M.L.S. Thesis, Indiana University Southeast.
[If a university or college has more than one campus or location, cite the Location; main campus does not need a citation.]

NOTE_M.A. Thesis, Stanford University.

NOTE_Exit Project, Oregon State University.

NOTE_Master's Research Paper, Iowa State University.

NOTE_Educational Specialist Practicum, Nova University.

e. Related Documents

If it is desirable for any reason to refer to other documents related to the one in hand, the reference should be entered in the Note field. Do not enter the data in the Abstract field. Whenever it can be done succinctly, the related note should identify the item and the relationship, e.g., student edition, teacher's manual, etc.

Example:

NOTE_For related documents, see TM 020 499-503.

Related documents may be other volumes in a multiple volume set, other volumes in the same series, other volumes on the same project, appendices to a given report, other papers emanating from the same conference, etc. References to related documents should be made judiciously and should not attempt to cover an excessive number of documents.

Examples:

NOTE_For volume 1, see ED 330 596.

NOTE_For the final report, see SE 052 309.

NOTE_For the corresponding student's manual, see SP 013 456.

Whenever possible, the ED number of the related document should be cited rather than the Clearinghouse Accession Number. However, when the items are all in the same issue of RIE, the ED number is not known at the time the description is being prepared and therefore the Clearinghouse Accession Number must be used. It is acceptable to cite a mix of Clearinghouse Accession Numbers and ED Accession Numbers, citing earlier items first. Do not cite a number to be included in a future issue of RIE, since if the announcement did not materialize, the reference would be "blind."

Examples:

NOTE_For related document, see ED 223 345.

NOTE_For related documents, see ED 223 345 and FL 123 456-475.

As part of the editing process at the ERIC Facility, each Clearinghouse or ED number is verified as to its accuracy and, in the case of Clearinghouse Accession numbers, its existence. In addition, the Note field of each item cited as related within the issue is checked to be certain it also contains the "reciprocal" Note. Obviously reciprocal Notes are only possible when the related items are in the same issue.

Examples:

NOTE_For student edition, see CG 123 456. [Item itself has Clearinghouse Accession Number CG 123 455.]

and

In the Note field of CG 123 456 would appear:

NOTE_For teacher's manual, see CG 123 455.

Related notes normally should not contain long strings of numbers extending over many RIE issues (e.g.: NOTE_For earlier volumes in this series, see ED 123 456, ED 170 678, ED 223 798, ED 224 880, ED 237 900, ED 248 910, ED 303 455, ED 317 777, ED 328 678). Instead, "piggyback" the numbers and cite only the latest in the series, i.e., ED 328 678. When the user goes to that record, presumably the next earlier volume, ED 317 777 will be cited in turn. This procedure should be used especially when the documents are earlier editions of like titles. If it is desirable to pull together a series of volumes where the editions of a popular, recurring document have titles which are difficult to retrieve because they were produced under different names, then a cumulation of numbers such as above should be entered for one annual edition, with subsequent entries referring only to the latest.

In the case of a sequential group of related documents, the "related document" note should be written in compressed form and may refer to itself as part of the sequence, e.g., for the note to be included on TM 123 458:

Correct:	NOTE_For related documents, see TM 123 456-460.
Incorrect:	NOTE_For related documents, see TM 123 456-457, and TM 123 459-460.

f. Analytics

Analytics are documents put into the system in two ways: as a single entry and as separate entries for the individual items within that single entry. The most common use of analytics is for documents which are conference proceedings containing numerous conference papers on a range of topics or a collection of papers on various subjects (e.g., readings in teaching geography, educational research on elementary instruction). The entire conference proceedings, when analyzed, is referred to as the "parent" and the individual papers within the proceedings as the "children." Processing documents as analytics allows users the option to obtain only the specific paper or papers they are interested in rather than having to obtain the entire larger and more expensive "parent" document.

Children of analytics are normally required to be entered at Level 1 or 2; Level 3 may be used on occasion, but only with prior approval of OERI. (Use of an extended length, table-of-contents type abstract usually obviates the need for a Level 3 analytic.) All items to be analyzed must be entered in the same issue of RIE and not spread over more than one issue.

The Note field of the parent, i.e., the proceedings, should be cited as:

NOTE_For individual papers, see HE 020 310-350.

The Note field of the children, i.e., the individual paper would be cited as:

NOTE_In: Colleges Today, Proceedings of the National Conference on Higher Education (10th, Washington, DC, May 10-13, 1991); see HE 020 309.

If a proceedings/collection as well as the individual items within it have a corporate source which is cataloged, then the entry of the children would read:

NOTE_In its: Education Today, Proceedings of the Invitational Seminar on the Future of Education (Washington, DC, November 19, 1991).

The "its" refers to the corporate source. Papers contained within a published proceedings should always be treated as analytics and not cited as "Paper presented...."

g. **"In" Notes**

Occasionally individual papers or chapters are analyzed out of larger documents that themselves may or may not be going into the system. The cataloging records the specific title and author of the analyzed paper, but also needs to put the paper in context by referring to the larger work of which it is a part. This is best done by an "In" or "In its" note. The "In" note references the title, author and/or institution, series and/or publication date of the larger work. If the institution of the part is the same as that of the larger work, an "In its" note may be used, avoiding duplication of the institution reference.

Examples:

NOTE_In: The Collected Teachings of Confucius. Oxford, Clarendon Press, 1987. v5, p79-124.

NOTE_In: Brown, James, Comp. Selections from Famous Diaries. New York, Decker Press, 1990. p240-259.

NOTE_In its: Papers and Reports on Child Language Development, Number 25, p160-169, Aug 1988.

NOTE_In its: Workpapers in Teaching English as a Second Language, Volume 25, p69-102, Dec 1989.

h. **Extracts, Summaries, Derivations, etc., from Larger Documents**

ERIC Digests and other publications often condense or synthesize larger documents into a smaller document; in the case of Digests, a two-page document. The Note field is used to reference the larger document being winnowed down. If the Digest or other condensation cites the larger document, that citation should be entered in the Note field as found.

Examples:

NOTE_Based on "Education and Society," by Julia Jones, see ED 123 456.

NOTE_Excerpted from "Education and the Future," by Timothy Adams, see ED 123 456.

NOTE_Data derived from the Pennsylvania Department of Education's "Listing of Public School Enrollments by County, School and Race" for 1986-87, 1989-90, and 1990-91.

i. **Documents with Legibility/Reproducibility Problems**

Documents that contain material of marginal legibility that may not reproduce satisfactorily should have a brief note added alerting the user to such material. If the document has been assigned Level 2 (i.e., no paper copy) because of such material, then a note must be added explaining the situation.

Examples:

NOTE_Appendix C contains photographs that may not reproduce clearly.

NOTE_Contains many pages of small, broken type.

NOTE_Printed in colored ink on colored paper.

NOTE_Appendixes may not reproduce clearly.

NOTE_Charts/figures may not reproduce clearly.

NOTE_Small print in tables may not reproduce clearly.

NOTE_Appendix D contains difficult-to-read computer type.

NOTE_Light type throughout.

NOTE_Appendix B not in the document received by ERIC and is unavailable.

NOTE_Sample questionnaires contain handwriting.

Regardless of the Level, reproducibility problems should be called to the user's attention. Brief statements in the Note field will alert users to problems and thereby reduce complaints about microfiche and/or reproduced paper copy quality.

Since the EDRS Price field for Level 2 documents contains the statement **"Paper copy not available from EDRS"**, do not repeat this information in the NOTE field.

All legibility problems should be stated as briefly as possible.

TOO LONG NOTE_Some of the figures and some of the tables in part C may not reproduce well due to small and broken type.

IMPROVED NOTE_Some part C pages marginally legible.

or

Some part C pages may not reproduce clearly.

TOO LONG NOTE_Figure 3, page 13 (Sample: Student Station Utilization Chart) and Figure 4, page 14 (Sample Data: Student Station Utilization) may not reproduce well due to marginal legibility of original.

IMPROVED NOTE_Several figures may not reproduce well due to marginal legibility.

j. Copyrighted Segments of Documents

If a document has been made available for Level 1 processing by eliminating a copyrighted portion, an entry concerning the missing material must be made in the Note field in one of the following formats:

NOTE_Pages 121-143 of the original document are copyrighted and therefore not available; they are not included in the pagination.

NOTE_Pages 64, 66, and 68 of the original document are copyrighted and therefore not available; they are not included in the pagination.

k. **Translation**

The translators of works having their own Personal Author are not cataloged in the Personal Author field. If it is felt useful to record the name of the translator, the information should be cataloged in the Note field, as follows:

NOTE_Translated by Pyotr Kasparov.

l. **Miscellaneous Data**

In addition to information discussed above, the Note field is also used to provide data that should be captured, but that does not "fit" into another field. Among the miscellaneous uses are the following examples:

- **Document prepared by a committee, collective group, task force, project, etc.**

  If the title of the document does not include the name of the committee, collective group (e.g., "Revising Science Instruction. Report of the Curriculum Committee."), then the Note field should be used.

  NOTE_Prepared by the 1990-1991 Curriculum Committee.

  [The institution of which the committee is a part would be cited as the corporate source.]

  NOTE_A publication of the "Save Our Schools Project."

- **Sponsor is a transient organization that will not have a continuing existence**

  An organization such as a memorial fund or search committee may exist for a year or two and then fade from existence, never to be seen again. Rather than clutter up the *Source Directory* with such transient organizations, it is often the better course to simply cite the information in the Note field.

  NOTE_Funded by the Jason Memorial Fund.

- **Document cites a long list of sponsors**

  Sometimes a document will cite so many financial supporters that it is not practical to catalog them all. In such instances a major supporter (or supporters), if this can be determined, may be cataloged selectively. The rest of the supporters can be referenced in the Note field.

  NOTE_Funding also received from the Education Fund of the Pocono Society for Historic Preservation.

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- **An organization appearing in the document is a subunit of an already existing small organization**

  Rather than establish a new code for a subunit of an already small organization, it is better to catalog under the main organization and, if necessary, cite the subunit in the Note field.

  NOTE_Prepared at Washington Junior High School.
  [The school district would be the corporate source.]

  NOTE_Prepared in the Department of Curriculum Development.

- **The organization name contained on the document is incomplete and cannot be verified as to format, geographic location, or relationship to document**

  In such situations, where there is not enough information on which to base the creation of an entry in the *Source Directory*, the information is cataloged in the Note field verbatim, as it appears on the Title page.

- **Numbers associated with document that are not report numbers**

  Occasionally Title pages will have numbers which appear to be non-report numbers, but may need to be recorded. For example, reports from the National Center for Education Statistics (NCES) frequently cite "Data Series...." This information is not a report number and should be entered in the Note field exactly as listed on the document.

  Example:

  NOTE_Data Series: DR-NELS:88-88-1.7.

  A Serial No. appears on some Congressional hearings (in some cases several numbers on one document). This number also should be added to Note field.

  Example:

  NOTE_Serial No. 102-53.

- **Cover Title vs. Title Page Title**

  Sometimes the title on the title page and the cover are at variance. The title that is not cataloged in the Title field should be referenced in the Note field. This information will provide an additional retrieval point.

  Example:

  NOTE_Cover title: "Pararprofessionals in the Public Schools of Utah."
  [Title selected and entered in the Title field was: "The Role of Paraprofessionals in Utah Schools."]

- **Accompanying Non-Print Material**

  If a document has non-print material such as a videotape, computer diskette, etc., that information should be recorded in the Note field.

Example:

NOTE_An Apple high density diskette and a VHS videotape accompany this document.

m. Use of Note Field in CIJE

Beginning with the January 1984 issue of CIJE, the Note field was added to CIJE resumes. It can be used in some of the following ways:

- **Availability of "Oneshot" Journals**

  One of the primary uses in CIJE for the Note field is to provide a place to cite the availability of "oneshot" journals (i.e., journals not regularly covered by CIJE and thus not listed in the *Source Journal Index* of that publication). As indicated in the discussion of the Availability field elsewhere in Section V, the Availability field may not be used for such information in CIJE; instead the data is provided in the Note field.

  Example:

  NOTE_Journal availability: American Association of University Administrators, 2121 "I" St., N.W., 8th Floor, Washington, DC 20052.

  If there are a number of articles from the same journal, subsequent items in the same issue may have the following field:

  NOTE_For journal availability, see HE 529 387.

  Availability information for regularly covered journals is listed in the *Source Journal Index*; the Note field should not be used to replicate this information.

- **Other Uses of the Note field in CIJE**

  — Theme Issues (One issue devoted to just one topic)

  NOTE_Theme issue topic: "Reducing the Dropouts."

  — Institutional Information

  NOTE_A position statement of the International Reading Association.

  NOTE_Prepared by the National Education Association.
  [Since CIJE does not have a corporate source field, the Note field can be used record this information.]

n. Historical Background of the Note Field

From 1966 through 1978, the language of non-English language documents was described in the Note field, e.g., "In French." Beginning with the January 1979 issues of RIE (ED 157 988) and CIJE (EJ 186 218), the language(s) of documents has been indicated in the Language field.

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SUMMARY OF SIGNIFICANT RULES

1. The Descriptive Note field is intended as a place to put a wide variety of information that should be communicated to the user, but that does not fit in any of the other fields, e.g., meeting where paper was presented, dissertation/thesis notes, related document notes, legibility problems, etc.

2. Punctuation should be in accordance with the normal rules of English usage, e.g., separate completely different thoughts or notes with a period rather than a semicolon, just as you would in regular text. However, the semicolon does not function as a subfield delimiter in the Note Field and may be used as a normal element of punctuation.

3. Documents containing significant amounts of marginally legible reproducible material should carry a Note alerting the potential purchaser to this fact.

4. "Parent" documents should always carry a Note referring to any analytic "children" being individually entered.

5. When citing related ED numbers, use proper format, e.g., "For related documents, see ED 338 996-997, ED 338 999, and ED 339 101."

6. When noting related documents, specify the nature of the relationship when possible.

7. The standard two-character postal abbreviations for the states should be used in this field, where appropriate.

EXAMPLES

PAPER PRESENTED AT...	Paper presented at the Annual Meeting of the Eastern Psychological Association (62nd, New York, NY, April 11-14, 1991).
DISSERTATION	Ph.D. Dissertation, University of Connecticut.
RELATED DOCUMENT(S)	For related documents, see UD 028 376-392.
REPRODUCIBILITY PROBLEMS	Document contains small type.

B.18 PAGINATION

Profile

Data Element/Field	- Pagination
Data Entry Tag/Keyword	- PAGE_
Files	- RIE
Mandatory/Optional	- Mandatory
Data Provided By	- Level 1 & 2 (ERIC Facility); Level 3 (Clearinghouse)
Character Set	- Numeric
Subfields Permitted	- No
Field Length	- 1 (Min.); 10 (Max.)
Field ID No. (Tape)	- 39

TYPICAL ENTRY (RIE Only) PAGE_1543

a. General

The Page field for Level 1 and 2 documents contains the number of microfiche frames needed to film the document; for Level 3 documents (i.e., those documents not available from EDRS), the number recorded is typically the last numbered page in the document. Pagination in RIE is not calculated according to normal library rules, but is instead equivalent to the number of microfiche frames required to film the document. The pagination number is used by the RIE computer system to determine how many microfiche will be required for each document. Since the total number of fiche for each accession is indicated on every fiche (e.g., "Card 1 of 5," etc.) and the number of total microfiche frames determines the EDRS microfiche and paper copy prices, accuracy in page counting is essential.

In order to achieve the needed accuracy and consistency, the pagination of Level 1 and Level 2 documents (i.e., those available from EDRS) is centralized at the ERIC Facility. The detailed instructions for the Clearinghouses on arranging and preparing a document for pagination and filming are discussed in Appendix B of this Manual, entitled, "Document Preparation (for Filming)," and are not repeated here. However, information on the procedures the Facility uses to number stamp the various kinds of pages it receives from the Clearinghouses is discussed below.

b. General Guidelines

Clearinghouses are responsible for all document preparation including the proper arrangement of the document, its completeness, etc. All Level 1 and 2 documents are to be shipped to the ERIC Facility without cataloging the Pagination data element. Essentially all documents shipped for Level 1 or 2 will be 8½" x 11 (portrait or right reading) or 11" x 8½" (wrong reading or landscape). The latter will be filmed as two pages.

There is no upper limit on the size of a document (i.e., a document is acceptable even if it is 5,000, 10,000, etc. pages); thus documents too large to be bound as one item, but with continuous pagination, should be treated as one document. ERIC policy requires that documents under five pages (except for ERIC Digests, which are typically two pages) should be reviewed by the Clearinghouse Management but, if approved at that level, may be entered into the system.

However, in the case of Level 3 documents (i.e., those not available from EDRS), the Clearinghouses would not normally send such documents to the ERIC Facility. It is necessary, therefore, that the Clearinghouses catalog the pagination for Level 3 documents. Level 3 pagination can be determined in accordance with normal cataloging rules, since Level 3 documents are not microfilmed and sold by EDRS. In the case of Level 3 documents, an entry in the field by the Clearinghouse is mandatory. Normally the last numbered page is the pagination number cited for Level 3 documents.

c. Procedures for Arranging and Paginating Level 1 and 2 Documents

Pagination for Level 1 and 2 documents is not simply the number of sheets of paper or sides with printing. It is, instead, defined as the number of microfiche frames required to photograph the entire document, which is frequently another number entirely. Therefore, special procedures are followed to determine pagination, as follows:

- **Number Stamping (ERIC Facility Function)**

  All pages, or portions of pages which will become microfilm images, will be sequentially number-stamped, using a Numbering Stamp Machine. The numbering machine should have numerals approximately one-quarter inch (¼") high, and should have a capacity of at least 4 digits. If all pages of the document are 8½" x 11" or smaller, each page is number-stamped once, preferably at the bottom center of the page.

- **Single Frame Resume Allowance (ERIC Facility Function)**

  Since the first page of a microfiched document is always the Single Frame Resume produced at the ERIC Facility, stamping begins by numbering the first filmable page of the document (title page or cover) with the number 2. With this procedure, the number of the last page stamped on the document will then be the number of actual microfiche frames that will be required of EDRS.

- **Valid Pages vs. Invalid Pages (Clearinghouse Function)**

  All printed pages, including covers, prefaces, title pages, frontispieces, indexes, pocket materials, etc., should be arranged in the sequence in which they are to be number-stamped and microfilmed. Covers and/or title pages are the first pages of a document to be filmed. When these two pages are completely identical to one another, as sometimes occurs, one can be considered unnecessary and deleted. Blank pages, superfluous tabbed separators, etc., are either deleted or marked "Do Not Film." All "printed" pages are paginated and eventually filmed.

d. Recording the Pagination

Following the completion of pagination, the number of pages (i.e., frames to be filmed) is added to the Page field. The number is added without punctuation or a "p." The field is mandatory and must be present along with a completed Level field in order for the EDRS Price field to be computed.

e. Additions to the Page Count

Normally, the Single Frame Resume referred to earlier in this discussion is only one page in length. If, during editing, the resume is found to be the table-of-contents type, which will not fit on one page because it is extra long, a second page is added to the count, but the document is not re-stamped.

B.19 PUBLICATION DATE

Profile	
Data Element/Field	- Publication Date
Data Entry Tag/Keyword	- PDAT_
Files	- RIE/CIJE
Mandatory/Optional	- Mandatory
Data Provided By	- Clearinghouse (RIE); Computer (CIJE)
Character Set	- Alphabetic, Numeric, Brackets
Subfields Permitted	- No
Field Length	- 2 (Min.); 7 (Max.) 5 (Avg.)
Field ID No. (Tape)	- 23

TYPICAL ENTRIES (RIE)

PDAT_5Sep91
PDAT_30Sep91
PDAT_Sep91
PDAT_91
PDAT_[91]

TYPICAL ENTRIES (CIJE)

No entry required by cataloger; Publication Date is derived by the computer from the last four characters in the journal citation and the year only inserted into the record in this field in the above format.

a. Cataloging RIE Publication Dates

(1) General

The Publication Date of the document is a mandatory field and should be entered with as much precision as the information in the document permits. If no Publication Date, as such, appears on the title page, cover, or elsewhere in the document, the following may be used, in order of preference:

- Date work completed;
- Date report submitted;
- Date paper presented;
- Copyright date (latest);
- Date provided by external documentation (e.g., reproduction release, letter of transmittal, etc.);
- Date estimated from data within the document (e.g., latest entries in bibliography).

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The Publication Date is entered in one of the following formats only:

- 3Jun92
- 14Jun92
- Jun92
- 92

Only the last two digits of the year of publication are used in the database. Some of the online or CD-ROM vendors, for the sake of consistency throughout their outputs, expand this data element back to its original four characters (e.g., "1992.").

Do not leave blanks or supply zeroes for missing information. Use only the following three-character abbreviations for the months:

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

Use only one of the above formats. No other variations (e.g., Spr, Aut, Win, Sept., etc.) are permissible.

If the Publication Date is determined by the cataloger by inference, or from information not in the document, enclose the supplied date in square brackets [Apr92]. Publications which are later editions of originals that were published earlier should be assigned the date of the later edition and not the date of the original.

(2) Importance of the Publication Date Field and Its Mandatory Status

Until 1982, the Publication Date was an optional data element; however, it was present on over 99% of all records. The Publication Date can be a crucial piece of information to the user attempting to restrict or to evaluate search output. Restricting search output to items prepared in a given time period is one of the most common ways to partition the file and thereby to limit output. When searches employ the Publication Date as an element in the search logic, the absence of a date can prevent an otherwise legitimate retrieval from occurring.

In addition, the Publication Date may be important when a user does a subject search in "high tech" areas such as computers; for example, a guide for specific computer usage dated "1978" probably would be of little value to users today unless the object of the search is to develop a historic literature review.

Documents generally carry dates on their covers, title pages, or front matter. When not explicit, dates can often be inferred from internal evidence (including bibliographic entries). In addition, contacts with authors or sources via telephone, correspondence, FAX, etc., can also often reveal dates. Although for most fields catalogers are advised to catalog solely from the document inhand, the Publication Date is one field for which some data must always be supplied, whether on the document or not.

b. CIJE Journal Articles

The Publication Date field in CIJE is supplied by the computer, which copies the year from the Journal Citation field and enters it in the Publication Date field. Clearinghouses should not catalog any data for this field in CIJE.

SUMMARY OF SIGNIFICANT RULES

1. The Publication Date is a mandatory data element for all RIE and CIJE records.

2. The cataloger must enter a Publication Date for all RIE records. Invariably, it either appears explicitly on the document or can be inferred (to at least the year) from internal evidence.

3. If necessary, Publication Dates may be supplied by the catalogers on the basis of information not in the document, or on the basis of non-explicit clues contained in the document.

4. The format of data in this field is restricted to:

   2 numeric (day)
   3 alpha (month)
   2 numeric (year)

   recorded without blank spaces, e.g., 30Apr92.

5. If a Publication Date is supplied by the cataloger based on indirect evidence or by inference, the Date should be enclosed in square brackets: [92].

6. In CIJE, the Publication Date field is generated automatically by the computer from the trailing data (i.e., year only) cataloged in the Journal Citation field.

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EXAMPLES

Day, Month, Year	4Dec91
	25Mar92
Month, Year	Feb92
Year Only	92
Date Estimated by Cataloger	[91]

B.20 EDRS PRICE CODE

Profile

Data Element/Field - EDRS Price Code
Data Entry Tag/Keyword - PRICE_
Files - RIE
Mandatory/Optional - Mandatory
Data Provided By - Facility — Computer Generated from Level and Pagination Data
Character Set - Alphabetic, Numeric, Special
Subfields Permitted - No
Field Length - 33 (Min.); 62 (Max.); 38 (Avg.)
Field ID No. (Tape) - 37

TYPICAL ENTRIES (RIE Only)

Level 1	EDRS Price - MF01/PC03 Plus Postage.
Level 2	EDRS Price - MF01 Plus Postage. PC Not Available from EDRS.
Level 3	Document Not Available from EDRS.

NOTE: *This data element is not cataloged by the ERIC Clearinghouses.*

The EDRS Price Code field is not entered manually[18] by either the ERIC Clearinghouses or the ERIC Facility. The contents of this field are generated automatically by the computer system on the basis of data contained in the Level and Pagination fields. The Level determines the format of the statement (as shown in the "typical entries"). The Pagination determines the specific codes(s) (e.g., MF01, PC03, etc.) inserted into the statement. The codes increase with increases in document size, according to the conversion table shown in **Figure V-12**. The meaning of the codes (in dollars and cents), and hence the table, changes whenever EDRS announces a price change (on approximately an annual basis). However, the codes themselves do not change and the data on the ERIC Master Files, therefore, remain valid.

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[18] The only time this field is manually keyed is when changes must be made during backfile corrections. The program does not automatically generate the field if existing pagination and/or Level data are changed on the Master File.

ERIC Price Codes

PAPER COPY /HARD COPY

PRICE CODE	PAGINATION	PRICE
PC 01	1 - 25	$ 3.20
PC 02	26 - 50	6.40
PC 03	51 - 75	9.60
PC 04	76 - 100	12.80
PC 05	101 - 125	16.00
PC 06	126 - 150	19.20
PC 07	151 - 175	22.40
PC 08	176 - 200	25.60
PC 09	201 - 225	28.80
PC 10	226 - 250	32.00
PC 11	251 - 275	35.20
PC 12	276 - 300	38.40
PC 13	301 - 325	41.60
PC 14	326 - 350	44.80
PC 15	351 - 375	48.00
PC 16	376 - 400	51.20
PC 17	401 - 425	54.40
PC 18	426 - 450	57.60
PC 19	451 - 475	60.80
PC 20	476 - 500	64.00
PC 21	501 - 525	67.20
PC 22	526 - 550	70.40
PC 23	551 - 575	73.60
PC 24	576 - 600	76.80
PC 25	601 - 625	80.00
PC 26	626 - 650	83.20
PC 27	651 - 675	86.40
PC 28	676 - 700	89.60
PC 29	701 - 725	92.80
PC 30	726 - 750	96.00
PC 31	751 - 775	99.20
PC 32	776 - 800	102.40
PC 33	801 - 825	105.60
PC 34	826 - 850	108.80
PC 35	851 - 875	112.00
PC 36	876 - 900	115.20
PC 37	901 - 925	118.40
PC 38	926 - 950	121.60
PC 39	951 - 975	124.80
PC 40	976 - 1,000	128.00

ADD 3.20 FOR EACH ADDITIONAL 25 PAGES,
OR FRACTION THEREOF

MICROFICHE

PRICE CODE	PAGINATION	NO. OF FICHE	PRICE
MF 01	1 - 480	1-5	$1.16
MF 02	481 - 576	6	1.41
MF 03	577 - 672	7	1.66
MF 04	673 - 768	8	1.91
MF 05	769 - 864	9	2.16
MF 06	865 - 960	10	2.41
MF 07	961 - 1,056	11	2.66
MF 08	1,057 - 1,152	12	2.91
MF 09	1,153 - 1,248	13	3.16
MF 10	1,249 - 1,344	14	3.41
MF 11	1,345 - 1,440	15	3.66
MF 12	1,441 - 1,536	16	3.91
MF 13	1,537 - 1,632	17	4.16
MF 14	1,633 - 1,728	18	4.41
MF 15	1,729 - 1,824	19	4.66

ADD $0.25 FOR EACH ADDITIONAL MICROFICHE
(1-96 PAGES)

FIGURE V-12: **Price Conversion Table (Effective January 1992)**

B.21 PUBLICATION TYPE

Profile

Data Element/Field	- Publication Type
Data Entry Tag/Keyword	- PUBTYPE_
Files	- RIE/CIJE
Mandatory/Optional	- Mandatory
Data Provided By	- Clearinghouse
Character Set	- Numeric
Subfields Permitted	- Yes (up to 3)
Field Length	- 3 (Min.); 9 (Max.)
Field ID No. (Tape)	- 19

TYPICAL ENTRY

PUBTYPE_143; 160

a. General

The Publication Type field is designed to carry up to three 3-digit numeric codes, each designating a broad category or type of document or literature. *The purpose of this field is to describe the form of the document itself, not the subject of the document.*

The numeric codes, and the categories they represent, are displayed in two figures. **Figure V-14** is a summary listing of the codes and their meanings. **Figure V-15** provides detailed Scope Notes and examples of documents in each type. In addition, **Figure V-16** is an alphabetic index leading the cataloger from various types of publications to the most appropriate category (or categories).

This is a mandatory data element and is to be included in the cataloging for both RIE and CIJE. **NOTE:** The computer system automatically assigns 080 (Journal Article) to all CIJE records. No action is required by the cataloger to assign this code to CIJE entries.

Although a maximum of three (3) codes is permitted, in many cases one will be sufficient. Over-indexing by Publication Type should be avoided.

b. Reason for the Field

The Publication Type field was created so that ERIC users can restrict (i.e., partition) their searches to specific document types. For example, an elementary school curriculum specialist searching for curriculum guides on teaching reading to the learning disabled may not wish to see research reports or dissertations on the topic. Through the coordination of the subject content terms and the PUBTYPE field, the searcher can restrict output to the type of document desired, e.g., classroom materials intended for the teacher.

c. Assignment of Publication Type

The reason for the field's existence dictates the primary question a cataloger should always keep in mind when assigning Publication Type:

Would this item satisfy searchers seeking this document type?

Example: Users looking for literature reviews on bilingual education research are probably not going to be satisfied with a conference paper cataloged as a "literature review" when it is merely a 7-page paper containing a one-page overview of research.

The Categories that appear in the Publication Type list are intended to describe the organization or form of a document, as contrasted to the subject content of a document. For example, a bibliography, a directory, a dissertation, a regulation, a test, a teacher guide, are all particular ways in which information on a topic may be arranged, organized, presented, displayed, etc., for the user. Knowing that an item is expressed in one of these forms may tell the user something about the uses to which it can be put, but tells the user nothing about the academic discipline, research/problem area, or social content dealt with in the document.

Some categories are more abstract than others. The categories **"Books," "Journal Articles,"** and **"Speeches"** are virtually "empty containers" in which anything might reside and in which any topic (or other form, for that matter) can be found. The categories **"Dissertations"** and **"Tests,"** on the other hand, are not so "empty" and communicate much more information about the organization and structure the user will find in such an item. Nonetheless, the information communicated still pertains strictly to the organization/display/array/layout/treatment/structure/form of the material and not to any subject matter that it may address.

The different levels of form categories create a complex situation. A given item may be a **"Journal Article,"** but it may also be a **"Research Report."** A **"Book"** may also be a compilation of **"Statistical Data."** In order to resolve this problem, it is necessary to permit the cataloger to make multiple category assignments. Up to three form assignments are permitted. However, most documents will not require that many and can be categorized adequately with one or two codes.

It is crucial, however, for the cataloger to keep in mind that Publication/Document Type deals with form and not content. To assign the category **"Bibliographies"** is to say that an item is organized as a bibliography; it is not necessarily about bibliographies. To assign an item the category **"Reference Materials"** is to say that it is either wholly or substantially a reference document; it is not necessarily about reference.

Virtually all of the category names have the potential of referring to content. For example, it is possible to conceive of a research report the subject of which is the bibliometry of research reports. For this reason, most of the category names can also be found to exist as Descriptors in the ERIC *Thesaurus*, or as authorized Identifiers in the *Identifier Authority List*.

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d. Publication Type/Descriptor Relationship

Descriptors, as the name suggests, provide a brief description of a document using specific indexing terms (**see Indexing, Section VII**). Descriptors identify not only subject content, but also other categories of information (e.g., educational level, age level, research methodology, type of survey instrument used, population, etc.). Confusion sometimes occurs between subject content and these other categories. To reduce this confusion, the PUBTYPE field was created in 1974. Under this scheme, basic information about the type of document, formerly covered in the Descriptor field, is entered instead in the PUBTYPE field.

However, since Publication Types are relatively broad in scope, Descriptors may be assigned to augment or refine the document type (e.g., the Descriptor "Annotated Bibliographies" augments the PUBTYPE "Bibliographies"; Descriptors "Aptitude Tests," "Questionnaires," "Surveys" can augment PUBTYPE "Tests"). When Descriptors are used for augmenting the PUBTYPE, they are typically entered as Minor Descriptors. Only in unusual circumstances will the PUBTYPE also be the subject of the document and warrant the assignment of a Major Descriptor (for example, a state curriculum guide on how to develop curriculum guides at the state level would be indexed with the Major Descriptor "State Curriculum Guides."

The Descriptors that correspond exactly to Publication Type categories, or that are considered sufficiently parallel to Publication Type categories that they should not be used as index terms (unless they also reflect subject matter), are flagged in the ERIC *Thesaurus* and carry the following Scope Note: "Corresponds to PUBTYPE Code. Do not use except as the subject of a document." There are 22 Descriptors that carry this warning; they are listed in **Figure V-13** along with their corresponding PUBTYPE codes.

DESCRIPTOR	PUBTYPE
AUDIOVISUAL AIDS	100
BIBLIOGRAPHIES	131
BOOKS	010
CONFERENCE PAPERS	150
CONFERENCE PROCEEDINGS	021
COMPUTER SOFTWARE	101
DICTIONARIES	134
DIRECTORIES	132
DOCTORAL DISSERTATIONS	041
GUIDES	050
MASTERS THESES	042
MULTILINGUAL MATERIALS	171
PRACTICUM PAPERS	043
REFERENCE MATERIALS	130
REPORTS	140
RESEARCH REPORTS	143
SERIALS	022
SPEECHES	150
STATISTICAL DATA	110
TESTS	160
THESES	040
VOCABULARY	134

FIGURE V-13: Descriptors Corresponding to Publication Type Categories

e. Publication Type Groups

While multiple PUBTYPE codes (up to 3) are used in ERIC cataloging, there are certain groups of codes that should logically be regarded as mutually exclusive within themselves.

- **Collected Works (020-022 Group)**

  This category deals with collections of independent works by different persons or organizations. A serial/periodical publication comprised of separate individual articles is one type of collected work (022). The proceedings of a conference, containing either the papers given at that conference or surrogates of them, is another form of collected work (021). All other types of collections, not falling into the above two subcategories, are assigned the general code 020.

- **Dissertations/Theses (040-043 Group)**

  A given document should never be assigned more than one code from this group. A document cannot be both a Masters Thesis and a Doctoral Dissertation at the same time.

- **Practitioner-Oriented Materials (050-055 Group)**

  Most practitioner-oriented materials are either classroom-oriented or not. If classroom-oriented, such documents are usually intended either primarily for the student or primarily for the teacher. For these reasons, a document should generally not be assigned more than one code from this group. Exceptions occur on those occasions when a single document encompasses both the material intended for the teacher and the material intended for the student (or when two separate documents treating these two areas are combined by the Clearinghouse as one accession). [Catalogers should ask themselves the question "Where will this document be located in the classroom and who will use it? On the teacher's desk or on the student's desk; by the teacher or by the student?]

- **Information Analyses (070-073 Group)**

  Two numbers in this group are specifically used to identify ERIC Clearinghouse Publications:

  071 should be assigned to ALL ERIC Clearinghouse Publications; and

  073 is added to those ERIC Digests which will be available in full-text by some database vendors. [Currently the ERIC computer program adds the 073 code to the ERIC Digests Online data at the time the full-text is added to the master file. To prevent confusion on the part of ERIC users, the 073 code does not appear in RIE.]

  Since Clearinghouse publications are essentially information analyses, 070 and 072 should not be used on documents already having 071 assigned.

- **Reference Materials (130-134 Group)**

  While it is possible for a document to belong to more than one of the subgroups listed under this group, it happens relatively infrequently. As a practical matter, only one of these codes will normally be assigned to a given document.

- **Reports (140-143 Group)**

  This is such a large category (30% of all input to RIE) that subgroups were developed to break it down into more manageable size. If the document is oriented toward reporting research/technological results, then it is 143. If the document concentrates on evaluation or studying the feasibility of something, then it is 142. If the document simply describes how a given project or program has progressed, then it is 141. Normally, only a single code should be assigned from this group, based on the principal emphasis of the document, and recognizing that the lines between subgroups are not completely sharp and that many reports contain at least some aspects of the various subgroups.

f. Special Projects

On occasion a special Publication Type code is used internally to tag documents for specific purposes. Because the codes used are not formal Publication Types, they do not appear on the Publication Type Lists appearing at the end of this discussion. Since 1990, Clearinghouses have been tagging high quality documents or journal articles which they believe are especially important and significant and which should form the basis of an ERIC special collection. Currently, the two codes used for this are: 800 ("Compact ERIC") and 801 ("ERIC Schooldisk").

Codes in the 800 group are carried on the ERIC Master File, but do not appear in the printed publications, or the online/CD-ROM versions of the database.

g. Historical Background of the Data Element

The Publication Type field began in RIE in September 1974 (ED 090 358). Originally the "code" consisted of a single alphabetic character. Beginning with the July 1979 RIE (ED 166 357) the current three-digit code began. The alphabetic character codes on records prior to July 1979 were automatically converted to the three-digit code. The Publication Type field began in CIJE in August 1979 (EJ 199 007).

SUMMARY OF SIGNIFICANT RULES

1. Publication Type is a mandatory data element for all RIE and CIJE input. At least one code must be assigned to each record; a maximum of three may be assigned.

2. Publication Type codes designate the form of the document, not its subject matter.

3. Certain Descriptors (**see Figure V-13**) that are identical to the names of Publication Type categories (e.g., Tests) should not be used at all in indexing unless they clearly represent the subject matter of the document. All other Descriptors that represent form (e.g., Diaries) should generally be used in indexing as minor terms.

4. In CIJE, the Publication Type code 080 (Journal Articles) is assigned automatically by the computer system to all records.

5. Entire conference proceedings volumes (code 021) should be distinguished from individual conference papers (code 150). Entire issues of serials (code 022) should be distinguished from individual articles from serials (code 080). Either code 080 or 022 should be assigned to every record containing an entry in the Journal Citation field.

6. All ERIC Clearinghouse Publications should be assigned Publication Type 071.

EXAMPLES

A Bibliography (Code 131 = Reference Works - Bibliographies)	131
A Script for Use in a Dramatics Class (Code 030 = Creative Works Code 051 = Instructional Materials)	030; 051
A Paper Presented at the Annual Meeting of the X Society, Reporting on Research and Containing a Copy of a Survey Instrument Sent to 5,000 Educational Researchers (Code 150 = Papers presented at... Code 143 = Research Reports Code 160 = Questionnaires)	150; 143; 160
ERIC Clearinghouse Publication [All ERIC publications, including Digests, should have this Pubtype]	071
ERIC Digests Online (ERIC Digests submitted for Full-Text Processing)	073

ERIC Publication Types

Code	Publication Type
010	BOOKS
	COLLECTED WORKS
020	— General
021	— Conference Proceedings
022	— Serials
030	CREATIVE WORKS (Literature, Drama, Fine Arts)
	DISSERTATIONS/THESES
040	— Undetermined
041	— Doctoral Dissertations
042	— Masters Theses
043	— Practicum Papers
	GUIDES
050	— General (use more specific code, if possible)
	— Classroom Use
051	— Instructional Materials (For Learner)
052	— Teaching Guides (For Teacher)
055	— Non-Classroom Use (For Administrative & Support Staff, and for Teachers, Parents, Clergy, Researchers, Counselors, etc. in Non-Classroom Situations)
060	HISTORICAL MATERIALS
070	INFORMATION ANALYSES (State-of-the-Art Papers, Research Summaries, Reviews of the Literature on a Topic)
071	— ERIC Information Analysis Product (IAP's)
072	— Book/Product Reviews
073	— ERIC Digests (Selected) in Full Text
080	JOURNAL ARTICLES
090	LEGAL/LEGISLATIVE/REGULATORY MATERIALS
100	AUDIOVISUAL/NON-PRINT MATERIALS
101	— Computer Programs
102	— Machine-Readable Data Files (MRDF)
110	STATISTICAL DATA (Numerical, Quantitative, etc.)
120	VIEWPOINTS (Opinion Papers, Position Papers, Essays, etc.)
	REFERENCE MATERIALS
130	— General (use more specific code, if possible)
131	— Bibliographies/Annotated Bibliographies
132	— Directories/Catalogs
133	— Geographic Materials/Maps
134	— Vocabularies/Classifications/Dictionaries
	REPORTS
140	— General (use more specific code, if possible)
141	— Descriptive (i.e. Project Descriptions)
142	— Evaluative/Feasibility
143	— Research/Technical
150	SPEECHES, CONFERENCE PAPERS
160	TESTS, EVALUATION INSTRUMENTS
170	TRANSLATIONS
171	— Multilingual/Bilingual Materials

FIGURE 14: ERIC Publication Types—Summary

CODE	TYPE/CATEGORY	SCOPE/DEFINITION
010	BOOKS	Pure form or "empty container." Should also be categorized elsewhere when applicable.
020	COLLECTED WORKS —General	Collections of separate works, composite works, materials of mixed or diverse character or multiple focus.
021	—Conference Proceedings	Records/minutes/proceedings/summaries of conferences, meetings, colloquia, symposia, seminars, workshops, congresses, etc. Intended for documents representing entire conferences.
022	—Serials	Serial (entire), periodicals, bulletins, newsletters, newspapers, collections of articles, sections of journals. Does *not* include numbers in a monographic series. For individual journal articles use JOURNAL ARTICLES (080).
030	CREATIVE WORKS (Literature, Drama, Fine Arts)	Poetry, literary works, essays, novels, short stories, children's books, satire and humor, anecdotes, fairy tales, children's stories, fiction, proverbs, facetiae, quotations, maxims, belles lettres, correspondence, etc. Performing arts materials, dramas, plays, scenarios (movies, TV), scripts, theatre pieces, musical scores, ballets. If specifically intended as instructional materials, use also INSTRUCTIONAL MATERIALS (051).
	DISSERTATIONS/ THESES	Dissertations, theses, practicum papers.
040	—Undetermined	
041	—Doctoral Dissertations	
042	—Masters Theses	
043	—Practicum Papers	
050	GUIDES —General	Materials designed for immediate and practical use by either student, teacher, administrative or support personnel. These practitioner-oriented materials are subdivided into those intended for classroom use and those not intended for classroom use. Use the general category only when the document does not fall in one of the subcategories below.

FIGURE V-15: Publication Types (with Scope and Definitions) (Page 1 of 6)

CODE	TYPE/CATEGORY	SCOPE/DEFINITION
051	—Classroom Use: Instructional Materials (For *Learner*)	Instructional materials, readings, programmed texts, manuals, laboratory manuals, outlines, texts, workbooks, syllabi, study guides, orientation materials, textbooks, handbooks, exercises, learning modules, problems, resource guides. Materials intended for direct instruction of the *learner*; materials presenting the substantive information that forms the content of instruction.
052	—Classroom Use: Teaching Guides (For *Teacher*)	Curriculum guides, course outlines, units of study, lesson plans, teaching guides, leader guides, statements of behavioral objectives. Include Resource Guides (teacher-oriented), even if a combination of other types, e.g., Directories, Bibliographies. Materials intended as guides for the *teacher*—they may contain instructional materials, sample examinations, suggested learning activities, etc. Includes teaching tips, teaching techniques, "How to Teach" materials.
055	—Non-Classroom Use (For Administrative and Support Staff; and for Teachers, Parents, Clergy, Researchers, Counselors, etc. in Non-Classroom Situations)	Techniques for support and administration, e.g., how to conduct teacher evaluation; how to conduct inservice programs, guides for research methodology, etc. Manuals, guides/guidelines, handbooks—intended to provide substantive information on "What exists" or "How to do it" for the educational support population. Booklets, pamphlets, brochures, circulars, notices treating or explaining various factual matters within the educational community, e.g., types of jobs available. Guides intended for teachers but not directly related to instruction, e.g., tips for better parent conferences.
060	HISTORICAL MATERIALS	Histories, historical reviews, historical accounts, oral history transcripts, primary historical source materials and documentation.
070	INFORMATION ANALYSES (Literature reviews, state-of-the-art papers)	State-of-the-art summaries (comprehensive treatments, overviews), trend analyses, *"What research says...," "What we presently know in a given area."* Information analyses and syntheses, focusing on findings and not simply on bibliographic citations, summarizing the substance of the literature and drawing conclusions from it. Distinct from annotated bibliographies. NOTE: See also **BIBLIOGRAPHIES (131)**.
071	—ERIC Clearinghouse Publications	Publications prepared by the ERIC Clearinghouses (or any other component of the ERIC System).
072	—Book/Product Reviews	Book reviews, product reviews, software reviews.

FIGURE V-15: Publication Types (with Scope and Definitions) (Page 2 of 6)

CODE	TYPE/CATEGORY	SCOPE/DEFINITION
073	—ERIC Digests Online	ERIC Digests provided in full-text for EDO file.
080	JOURNAL ARTICLES	Pure form or "empty container." Should also be categorized elsewhere when applicable. **NOTE:** For entire Journal issues use SERIALS (022). Assigned Automatically by Computer System to all CIJE records.
090	LEGAL/LEGISLATIVE/ REGULATORY MATERIALS	Legislation, legislative hearings and testimony, legislative reports, congressional documents, state legislature documents, laws, summaries of legislative action, lobbying position papers. Court cases, courtroom testimony, court decisions, legal decisions, legal interpretations. Regulations, regulatory agency materials (directed at regulation). Codes, administrative codes, codes of student behavior, agreements, rules, policy statements, master plans, contracts (model), collective bargaining agreements, and other materials governing the behavior of various groups. Standards (e.g., ANSI, ISO, FIPS). Specifications. Accreditation standards. Professional standards. Executive Orders, *Federal Register* pronouncements. Do not include documents/articles merely "about" specific court case or legal issues.
100	AUDIOVISUAL/ NON-PRINT MATERIALS	Non-print media, audiovisual aids, films, tapes, recordings, cassettes, phonodiscs, videotapes, slides, illustrations, portraits, caricatures, cartoons, photographs, posters, models, flip charts, engineering drawings, flow charts, designs, plans, etc. Graphic/pictorial and other non-print representations, conveying meaning primarily through symbols other than words. *Non-print items usually appear in ERIC only as supporting or collateral material to a basic printed document.*
101	—Computer Programs	Actual computer programs in any form, e.g., floppy disks, tape cassettes, code listings, etc.

FIGURE V-15: Publication Types (with Scope and Definitions) (Page 3 of 6)

CODE	TYPE/CATEGORY	SCOPE/DEFINITION
102	MACHINE-READABLE DATA FILES (MRDF)	Bodies of data encoded in magnetic, optical, or other storage media that are directly readable by computer. The data may be numeric, statistical, bibliographic, textual, etc. ERIC announces education-related data files (e.g., NCES files) as long as they are available from third parties.
110	STATISTICAL DATA (Numerical, quantitative, etc.	Numerical data, quantitative data, statistics, statistical compilations, data aggregations, tables. **CAUTION:** *Do not overuse. Use only when quantitative data is present in large aggregations, e.g., as in NCES documents. The routine presence of quantitative data in Research Reports is not sufficient to categorize here.*
120	VIEWPOINTS (Opinion papers, position papers, essays, etc.)	Opinion papers, points of view, position papers, recommendations, "Blueprints" for proposed action. Debates, interviews, panel discussions, questions and answers, dialogues, transcripts. Essays, short expository/speculatory papers, "think" pieces, philosophical pieces, criticism, interpretation, editorials, pros and cons. **NOTE:** Testimony for legislative purposes should be categorized under LEGAL/LEGISLATIVE/REGULATORY MATERIALS (090).
130	REFERENCE MATERIALS —General	Materials for reference use, as contrasted to materials designed for cover-to-cover reading and study. Four special kinds of reference materials have been individually established as subcategories and should be used when appropriate. Use the general category *only* when the document does not fall in one of the subcategories below.
131	—Bibliographies	Bibliographies, filmographies, discographies, annotated bibliographies, book catalogs, book lists, abstracts (collections of), indexes (locators) to bibliographic materials, topical listings of various media materials. Include bibliographic essays, literature searches (output of), guides to or descriptions of the literature in a field. **NOTE:** For literature reviews analyzing the substance of the literature use INFORMATION ANALYSES (070 or 071).

FIGURE V-15: Publication Types (with Scope and Definitions) (Page 4 of 6)

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CODE	TYPE/CATEGORY	SCOPE/DEFINITION
132	—Directories/Catalogs	Directories of persons, organizations, institutions, etc. Membership lists. Tables of Contents. Include reference works dealing with organizations/institutions. Catalogs of products, lists and arrays of "things," e.g., pseudonyms, job descriptions, sources, acronyms, abbreviations, etc. For bibliographic catalogs, use BIBLIOGRAPHIES (131). Selection criteria will eliminate most catalogs.
133	—Geographic Materials	Atlases, gazetteers, geographic charts, cartographic materials, maps, zoning charts, school district maps.
134	—Vocabularies/ Classifications/ Dictionaries	Dictionaries, vocabularies, nomenclature, terminology, glossaries, thesauri, word/term lists, phrase books. Taxonomies, classification schemes.
140	REPORTS —General	Three specific kinds of *reports* have been individually established as subcategories and should be used when appropriate. Avoid multiple assignments within this category when possible. Use the general category only when the report does not fall in one of the subcategories below.
141	—Descriptive	Project descriptions, program descriptions, reports of organizational activities, *"This is now we do it...", "What I do in my class..."* Descriptions of systems, procedures, or practices in actual cases. Descriptions of significant events, personal narratives/experiences, journalistic accounts of actual activities and occurrences. Descriptive works of various types. Includes annual reports (of organizations), yearbooks.
142	—Evaluative/Feasibility	Studies evaluating research, alternative courses of action, or the merits of a particular process or program. Studies of feasibility of a given courses of action. Evaluations of programs. Studies oriented toward decision-making and concerned with judgments rather than generalizations.

FIGURE V-15: Publication Types (with Scope and Definitions) (Page 5 of 6)

CODE	TYPE/CATEGORY	SCOPE/DEFINITION
143	—Research/Technical	Original research, technical research, reports, studies, empirical results, experimental statistical studies, surveys, case studies, theory testing, systematic scientific investigations, seeking facts and/or generalizable principles. Emphasis on materials utilizing a formal research design, but may include informal reports and verbal presentations of such efforts. Include proposals for needed research.
150	SPEECHES, CONFERENCE PAPERS	Addresses, lectures, papers presented at.... **NOTE:** Reserved for single papers. For entire CONFERENCE PROCEEDINGS use 021.
160	TESTS, EVALUATION INSTRUMENTS	Questionnaires, tests, examinations, evaluation and measurement devices, test specifications, compilations of tests, opinion polls (instruments), assessment tools, reporting booklets, rating scales, test manuals, etc. **CAUTION:** *Do not overuse. Use only when entire instrument is actually present in document.*
170	TRANSLATIONS	To be applied to any document translated from its original language into a second language. The usual case will be a translation in to English from an original non-English text, but other translation situations also apply. Should also be classified elsewhere when possible.
171	—Multilingual/Bilingual Materials	Materials whose contents include equivalent or near-equivalent information in two or more languages. Classify elsewhere when possible. **CAUTION:** *Do not misuse. Nonequivalent content in two or more languages (collections of disparate articles in different languages, most foreign language textbooks, etc.) should be excluded from this category.*

FIGURE V-15: Publication Types (with Scope and Definitions) (Page 6 of 6)

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PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Abstracts	131
Administrator Guides	055
Annotated Bibliographies	131
Annual Reports	141
Answer Keys	160
Answer Sheets	160
Anthologies	020
[Archival Documents]	060
Atlases	133
Audiodisks	100
Audiotape Recordings	100
★Audiovisual Aids	100
Autobiographies	060
★Bibliographies	131
[Bilingual Materials]	171
Biographical Inventories	060 (132)
Biographies	060
[Booklists]	131
★Books	010
Book Reviews	072
Bulletins	022
[Bylaws]	090
Cartoons	100 (030)
Case Records [or] Case Studies	141 or 143 or 140
Catalogs	132
Charts	100
Check Lists	130 or 160
[Childrens Books]	010 and 030
Childrens Literature	030 (010)
Chronicles	060 (020)
Citation Indexes	131
[Class Newspapers]	022
[Classroom Games]	051 (100)
[Classroom Materials]	051 or 052
Codes of Ethics	090
Comics (Publications)	030
Computer Output Microfilm	100
★Computer Software	101
Computer Software Reviews	072 (142)
[Concordances]	134
★Conference Papers	150
★Conference Proceedings	021

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
[Conference Summaries]	021
Contracts	090
Course Descriptions	052 or 050 or 051
[Courtroom Transcripts]	090
[Creative Works]	030
Curriculum Guides	052 or 050 or 051
[Data Sheets]	110 or 130
Databases	102
Diagrams	100
Diaries	120 (060 or 030)
★Dictionaries	134
[Dictionary Catalogs]	131
★Directories	132
[Discipline Codes]	090
Discographies	131
★Doctoral Dissertations	041
Documentaries	100 (141)
Drama	030
Editorials	120
Encyclopedias	130
[ERIC Digests in Full Text]	073
[ERIC CH Pubs]	071
Essays	120 or 030
[Evaluation Studies]	142
Facility Guidelines	055
Faculty Handbooks	055
Feasibility Studies	142
Filmographies	131
Films	100
Filmstrips	100
Flow Charts	100
Foreign Language Books	010 (170)
Foreign Language Films	100 (170)
Foreign Language Periodicals	022 (170)
Games	030 or 100
Glossaries	134
Graphs	100
Guidelines	050 or 052 or 055
★Guides	050 or 051 or 052 or 055

FOOTNOTES:

1. All terms not in brackets have been selected from the ERIC *Thesaurus.*
2. Conventions
   - A or B = one or the other category is appropriate, depending on item.
   - A and B = two categories are appropriate.
   - A (B) = a second category might be appropriate, depending on item.
   - ★ = category and term are synonymous. Term should be used in Descriptor field only when it denotes subject matter.
3. These terms, like all other Descriptors identifying the form or type of a document, should be used as major Descriptors only when they represent the subject of the document in hand.

FIGURE V-16: **Guide for Assigning PUBTYPE Codes (A Cross-Reference from Specific Kinds of Documents to Most Applicable Publication Type Code) (Page 1 of 3)**

[Bracketed terms are not Descriptors]

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Hearings	090
[Historical Reviews]	060
Illustrations	100
Indexes	130 or 131
[Information Analyses]	070 or 071
Instructional Materials	051
Interviews	120 or 160
Item Banks	160
[Journal Articles]	080
[Journals]	022
[Judicial Materials]	090
Kinescope Recordings	100
Laboratory Manuals	051
[Language Guides]	051 or 030 (170)
Large Type Materials	051
Leaders Guides	052
[Lecture]	150 (051)
[Legal Analysis]	090
Legislation	090
Lesson Plans	052
Letters (Correspondence)	030
[Literature Guides]	131
Literature Reviews	131 (070)
[Lobbying Papers]	090 and 120
Machine Readable Data File	102
Magnetic Tape Cassettes	100
Magnetic Tapes	100
[Manuals]	050 or 051 or 052 or 055
Maps	133
Master Plans	090
[Master Tapes (Audio)]	100
★Masters Theses	042
Matrices	100
Microforms	100
Models	100 or 143
★Multilingual Materials	171
[Musical Materials]	030
Negotiation Agreements	090
Newsletters	022
Newspapers	022
Nonprint Media	100
Opinions	120
[Oral History Transcripts]	060

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Pamphlets	Document Dependent
[Parent Guides]	055
Patents	090
Periodicals	022
Permuted Indexes	130 or 131
Personal Narratives	060 or 120
[Phonograph Records]	100
Photographs	100
Poetry	030
Position Papers	120
★Practicum Papers	043
Program Descriptions	141
Program Evaluation	142
Program Guides	141
Program Proposals	141
[Programed Texts]	010 and 051
Puzzles	030 or 100
Questionnaires	160
Rating Scales	160
[Recommendations]	120
Records (Forms)	Document Dependent
★Reference Materials	130 (010)
[Regulations]	090
★Reports	140
[Research Methodology Guides]	055
Research Proposals	143
★Research Reports	143
[Research Reviews (Publications)]	070
Resource Materials	050 or 051 or 052 or 055
Scholarly Journals	022
School Newspapers	022
School Publications	Document Dependent
Scripts	030
★Serials	022
Short Stories	030
Slides	100
Specifications	090
★Speeches	150
Standards	090
State of the Art Reviews	070
★Statistical Data	110
Student Journals	120 (030)
Student Publications	Document Dependent
Study Guides	051

FIGURE V-16: Guide for Assigning PUBTYPE Codes (A Cross-Reference from Specific Kinds of Documents to Most Applicable Publication Type Code) (Page 2 of 3)

[See explanatory footnotes on first page]

(Bracketed terms are not Descriptors)

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Surveys	or 143
Tables (Data)	110
Talking Books	100
Tape Recordings	100
[Taxonomy]	134
Teaching Guides	052
[Technical Reports]	143
Test Reviews	072 (142)
★Tests	160
Textbooks	010 and 051
Thesauri	134
★Theses	040

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
[Transcripts (Interview)]	120
[Transcripts (Legal)]	090
[Transcripts (Oral History)]	060
Videodisks	100
Videotape Recordings	100
★Vocabulary	134
Word Lists	134
Workbooks	051
Worksheets	051
Yearbooks	141 (022)

FIGURE V-16: Guide for Assigning PUBTYPE Codes (A Cross-Reference from Specific Kinds of Documents to Most Applicable Publication Type Code) (Page 3 of 3)

[See explanatory footnotes on first page]

(Bracketed terms are not Descriptors)

B.22 REPORT NUMBER

Profile

Data Element/Field	- Report Number
Data Entry Tag/Keyword	- REPNO_
Files	- RIE
Mandatory/Optional	- Optional
Data Provided By	- Clearinghouse
Character Set	- Alphabetic, Numeric, Special (Hyphen, Slash, Parentheses)
Subfields Permitted	- Yes
Field Length	- 310 (Max.); 12 (Avg.)
Field ID No. (Tape)	- 45

TYPICAL ENTRY (RIE Only)

REPNO_EDO-CE-91-10; ISSN-1234-5678

a. General

Report Numbers are unique alphanumeric designations assigned to documents by the preparing organizations, sponsoring agencies, or major report processing centers. Though most documents will have only one report number (if any at all), report numbers of all three types of organizations mentioned above may, in some cases, appear on the same document and should be recorded.

b. Format

Report Numbers can be troublesome to catalog because they appear on documents in so many variant formats. Standardized Report Number formats for some organizations can be determined from the ERIC *Report Number Index*, a periodically produced list of all Report Numbers used to date in the ERIC database.

c. Cataloging Report Numbers

(1) Hyphens for Spaces

Many Report Numbers appear on a report in an easily indexable form, consisting of letters (representing the preparing organization or monitoring agency), followed by a unique number. The only editing required for such a number is to insert a hyphen wherever a space appears, in order to assure uniformity in machine sorting. For example:

EDO-TM-91-9
NCES-91-222
GAO/HRD-91-106
PDE-83-0006
CPRE-RR-019
ISBN-0-208-02254-6

Other Report Numbers consist of a combination of letters and numbers, but the letters may not represent the originating organization or monitoring agency. Enter such numbers as they are given on the report, inserting a hyphen wherever a space appears, but otherwise retaining any punctuation. For example:

R64D61 RR-17 RM-4244

Note, however, that no final punctuation is used with Report Number prefixes (i.e., ASD, not A.S.D.), nor at the end of the number.

(2) Descriptive Words Within the Number

Many Report Numbers include descriptive words; these words may either be ignored or abbreviated. The words are ignored when the prefix/number form one distinct series from the given organization regardless of the descriptive words; they are abbreviated when there are two or more series of documents from the same organization, each associated with a specific group of words.

Example: DHHS Publication No. ADM-78-485

Incorrect: DHHS Publication ADM-78-485
Correct: DHHS-ADM-78-485

Example: NASA Technical Memorandum 455
NASA Technical Report 170

Correct: NASA-TM-455
NASA-TR-170

(3) Non-Distinctive Report Numbers

If a Report Number has a distinctive alphabetic prefix, it should be cataloged solely in the Report Number field and should not appear in the Title field. If no distinctive prefix can be ascertained, a generalized Report Number may be included as an element of the title/subtitle. A good example of this type might be a subtitle such as "Interim Report No. 2," serving to distinguish between the other interim reports (or Final Report) probably otherwise bearing the same substantive title.

(4) Abbreviations

Certain standard words frequently used to refer to reports and documents and often found in spelled-out form may be routinely abbreviated. A list of some of the more common abbreviations appears in **Figure V-17**.

Accession List	AL	Number	No
Addendum	Add	Pamphlet	Pam
Amendment	Amend	Part	Pt
Annual Report	AR	Progress Report	PR
Appendix	app	Project	Proj
Bibliography	Bib	Public Law	PL
Book	Bk	Publication	Pub
Bulletin	Bull	Research Memorandum	RM
Catalog	Cat	Research Note	RN
Chapter	Ch	Research Paper	RP
Circular	Circ	Revised, Revision	Rev
Conference	Conf	Section	Sect
Conference Paper	CP	Series	Ser
Contractor Report	CR	Special Report	SR
Contribution	Contrib	Specification	Spec
Curriculum	Curric	Summary	Summ
Document	Doc	Supplement	Suppl
Edition	Ed	Technical Memorandum	TM
Evaluation Report	ER	Technical Note	TN
Final Report	FR	Technical Publication	TP
Hearings	Hrg	Technical Report	TR
Informal Communication	IC	Technical Translation	TT
Internal Memorandum	IM	Translation	Trans
Leaflet	LF	Volume	Vol
Laboratory Note	LN	Working Paper	WP
Memorandum	M		
Memorandum Report	MR		
Miscellaneous Paper	MP		

FIGURE V-17: Abbreviations Commonly Used in Report Numbers

Note that the word "report," when appearing alone on a document, may generally safely be ignored, and replaced by a hyphen.

Example: Naval Air Training Command Report 5914

Incorrect: NATC-R-5914
Correct: NATC-5914

However, if the preparing organization is large and has many report series, then it is best to abbreviate "report" to "R." If the standard abbreviation for "report" (i e., "R") actually appears on the document, then it should always be retained and used in the Report Number.

Roman numerals in report number abbreviations should be changed to the Arabic form, for filing purposes. For example:

Incorrect: RDR-65-6-XII
Correct: RDR-65-6-12

If a single Report Number is issued in several parts, this information is added to the Report Number in abbreviated form, using hyphens, not commas or parentheses, for separation. For example:

ARC-11767-Vol-2

(5) Forming Valid Report Number Prefixes

Some reports are published in a definite numbered series, with a standard phrase always describing the series, but lacking, on occasion, any initials or acronym. In such instances, the phrase may be abbreviated if it can be established that:

- the prefix is used at times by the organization in question, or that
- the prefix has become commonly associated with the organization.

In other words, there should be some precedent in usage, either in previous documents of the same organization or in reference works such as that cited at the beginning of this section. Avoid creating complicated Report Number prefixes that have never at any time actually appeared on documents. Such creations can be bibliographic "red herrings," sometimes misleading and troublesome to librarians and other users.

Example: Visual Training Laboratory Report No. 65
(Acronym VTL is used on the cover)

Correct: VTL-65

d. **International Standard Book Numbers**

International Standard Book Numbers (ISBN) are unique numbers assigned by the publishing industry to the products they sell. They appear in catalogs and are frequently used as order numbers. They should be treated as identifying Report Numbers and should be entered as follows:

REPNO_ISBN-0-8352-1173-8

Sometimes a work will cite multiple ISBNs for its different editions and forms. Only the ISBN for the work in hand should be cited. Paperback editions and domestic editions each have their own ISBN Numbers. Domestic editions and non-U.S. editions each have their own ISBN Numbers. Always catalog the ISBN for the item in hand. The Availability field may cite alternative editions (their ISBNs), as long as they are distinguished from the item in hand. In some instances such as Canadian documents published in English and French in one document, two ISBNs are on the document and both should be cited:

REPNO_ISBN-0-7711-0993-9; ISBN-0-7711-0996-2

In early 1992, ISBNs began appearing on documents printed by the Government Printing Office.

e. **International Standard Serial Numbers**

International Standard Serial Numbers (ISSN) are assigned to journals, periodicals, and all types of serial publications. All issues of a given serial bear the same ISSN number. Prior to January 1991, ISSNs were not cataloged by ERIC for individual journal articles or for serial issues or runs. Beginning with the January 1991 RIE and CIJE issues, ISSNs are recorded whenever they appear on the document even if the document also has an ISBN as well.

The ISSN for RIE is:	0098-0897
The ISSN for CIJE is:	0011-3565

ISSNs are generally printed on journals without the hyphen after the ISSN prefix (e.g., ISSN 0098-0897), but when cataloging them as Report Numbers, they should appear with a hyphen replacing the blank, e.g., "ISSN-0098-0897."

NOTE — FOR CIJE ONLY: Articles from journals already listed in the Source Journal Index do not require ISSN because the computer system enters the correct ISSN automatically; however, articles from "Oneshot" journals must have an ISSN cataloged if one exists. ***(See Section V-B.14.d.4)***

f. **Multiple Report Numbers**

If there is more than one Report Number for a document, the additional numbers should be entered following the first number, but separated by a semicolon and a space.

REPNO_ETS-RB-78-12; ETS-RB-78-14

Report Numbers in sequential series on one accession should be individually entered, as follows:

REPNO_S-493; S-494; S-495

Do not elide them in the following format, as this will prevent their individual appearance in the *Report Number Index* and in computer retrieval files.

Incorrect: REPNO_S-493-495
REPNO_S-493 thru 495

g. **Congressional Documents**

Congressional documents are frequently processed by ERIC; the most common of these are hearings. However, occasionally ERIC processes formal House and Senate Reports and Documents. Since these series bear within their structure the identification of the particular Congress involved (e.g., 101st, 102nd, etc.), it is only necessary when recording the number to distinguish Reports from Documents.

House Hearings	House-Hrg-101-89
House Reports	House-R-92-898
House Documents	House-Doc-96-167
Senate Hearings	Senate-Hrg-102-45
Senate Reports	Senate-R-91-480
Senate Documents	Senate-Doc-94-258

Since the numbering scheme of House or Senate Bills begins anew with each Congress, it is necessary to qualify them with the identification of the applicable Congress if they are to be unique.

House Bills	HR-11267(92)
Senate Bills	S-2951(93)

Public Laws are documents and can be entered into the system. The Public Law number should be treated as an identifying Report Number and should be entered as follows:

REPNO_PL-92-415

h. **ERIC Digests**

ERIC Digests are produced by ERIC Clearinghouses. Each Digest is required by OERI to have a distinctive number in the following format: Clearinghouse Prefix (e.g., CE, CG, CS, etc.); year (90, 91, etc.); and number (1, 2, 3); the Clearinghouse prefix is prefaced by the standard letters "EDO" (standing for "ERIC Digests Online"). An example of a typical Digest number would be:

REPNO_EDO-CG-90-10

i. **Non-Report Numbers**

Occasionally numbers are found on documents which are not, in fact, report numbers. Among these non-numbers are:

- **Library of Congress Catalog Card Numbers (e.g., LC-89-0123400)**

  Typically these are found on the verso of the Title page. This number is the ordering number of the Library of Congress catalog cards. Do not catalog this number as a Report Number.

- **CFDA Numbers**

  CFDA is the acronym for *Catalog of Federal Domestic Assistance*. The number that is associated with the acronym, e.g., CFDA 13.433A, refers to a citation in the catalog that describes in detail a funding program, supporting legislation, eligibility, etc. The number does not represent a specific document and should not be construed as a report number or a contract number. It can safely be omitted in cataloging.

- **Numbers at the Back of GPO (Government Printing Office) Publications**

  Publications printed by GPO contain on the bottom of the last printed page a statement beginning "U.S. Government Printing Office" which is followed by a series of numbers. These numbers are not report numbers, but refer to the GPO purchase or print order under which the publication was produced; do not catalog these numbers. Report numbers of items published by GPO typically have a government agency's prefix (e.g., NCES) and appear on the front or back cover; these numbers should be cataloged. Stock Numbers of GPO publications, used for ordering purposes, if on the document at all, tend to be placed on the Title Page or its verso; this number should be employed in the Availability field, along with the price.

- **Data Series, etc.**

  Some government publications may contain other numbers such as "Data Series," "Serial Number," etc., which are not report numbers. When judged useful, these numbers can be cited in the Note field.

j. **Special Projects**

Periodically ERIC, because of a special need, uses the Report Number to track documents from a special project. One such project involves documents from the Chapter 1 Technical Assistance Centers (TAC). Documents submitted by TACs to the ERIC system have a TAC number written on them. This number should be recorded in the REPNO field.

k. **Report Numbers Assigned by Major Report Processing Centers**

Major information and document processing centers sometimes assign accession numbers that are later so useful in identifying, requesting, and utilizing documents that they are best treated as Report Numbers and captured at cataloging time. On occasion, through arrangement with the source, these numbers may actually be printed on the document at the time of original issuance. Even when this is not done, most of the copies of such documents in circulation will be those reproduced by the major information centers and therefore bearing the well-known accession numbers. An example of this type of accession number is as follows:

National Technical Information Service (NTIS)	PB-92-12345

The ED and EJ Accession Numbers also belong to this category and are often cited as, in effect, Report Numbers, by later handlers and processors.

SUMMARY OF SIGNIFICANT RULES

1. All unique identifying Report Numbers on the document should be cataloged, whether placed there by the preparer, sponsor, or processor.

2. Alphabetic prefixes (many of which will be based on the initials of the preparing organizations) should always be sought for Report Numbers in order to distinguish one number from another. Arabic numbers alone are not useful in indexes or for searching.

3. Commonly appearing words in Report Numbers should be abbreviated, e.g., Technical Report=TR; Research Paper=RP. Lists of such words and their abbreviations are provided for guidance (**see Figure V-17**).

4. Roman Numerals appearing in Report Numbers should be converted to Arabic numerals for filing purposes.

5. Multiple Report Numbers must be entered individually, each in its own subfield, to ensure retrievability of each number.

6. Treat International Standard Book Numbers (ISBNs) like any other identifying number and record them in the Report Number field (for retrieval purposes).

7. Treat International Standard Serial Numbers (ISSNs) like any other identifying number and record them (for serials and articles from serials) in the Report Number field for retrieval purposes.

8. Blank spaces are not permitted in Report Numbers. Report Numbers should be "standardized" by replacing all spaces with hyphens.

EXAMPLES

CONGRESSIONAL DOCUMENTS		House-R-99-898 House-Doc-96-167 Senate-R-91-480 Senate-Doc-94-258
ERIC DIGESTS	ERIC Clearinghouse on Career Education (CE)	EDO-CE-91-12
INTERNATIONAL STANDARD BOOK NUMBER		ISBN-0-8352-1173-8
INTERNATIONAL STANDARD SERIAL NUMBER		ISSN-1234-5678
MIX OF UPPER AND LOWER CASE	Human Resources Research Organization	HumRRO-PP-10-78
PREPARING INSTITUTION NUMBER	Johns Hopkins Univ., Applied Physics Lab.	JHU-APL-
PUBLIC LAW		PL-95-264
REPORT PROCESSING CENTER NUMBER	National Technical Information Service (NTIS)	PB-92-12345
ROMAN NUMERALS	INCORRECT: RDR-65-6-XII	CORRECT: RDR-65-6-12 (CONVERTED)
SPONSORING AGENCY NUMBER	Air Force Office of Scientific Research	AFOSR-
USE OF SLASHES IN PREFIX IN NUMBER	Coast and Geodetic Survey	C/GS-TT-76-52000/3
USE OF YEAR IN NUMBER IN PREFIX	Rand Corp. Annual Report	Rand-AR-91- [Year]
VOLUMES, PARTS, ETC.		ARC-11767-Vol-2

B.23 SPONSORING AGENCY

Profile

Data Element/Field	- Sponsoring Agency
Data Entry Tag/Keyword	- SPON_
Files	- RIE
Mandatory/Optional	- Optional
Data Provided By	- Clearinghouse
Character Set	- Code: Alphabetic, Numeric; Name: Alphabetic, Numeric, Special
Subfields Permitted	- Yes
Field Length	- Code (Fixed Length: 8 characters each); 68 (Max.); Name (212 characters each); Field Length: 1080 (Max. allowed); 378 (Max. Experience)
Field ID No. (Tape)	- Code: 32 Name: 132

TYPICAL ENTRY (RIE Only)

SPON_EDD00036=Office of Educational Research and Improvement (ED), Washington, DC.

A Sponsoring Agency is defined as an organization (e.g., government agency, private foundation, etc.), other than the Corporate Author, that supported the work (or the production of the document) by providing funds via a contract or grant. Names entered in this field must either come from the ERIC *Source Directory*, or, if new, must be constructed according to the standards appearing in **Attachment 3**. The instructions and examples for entering organization names that appear in Section V under INST dealing with the Institution data element, also apply to the entry of Sponsoring Agencies.

All documents bearing a contract or grant number should generally have a corresponding entry in the Sponsoring Agency field. Particular care should be taken, however, to ensure that all reports resulting from contracts or grants funded by the Department of Education (ED), or one of its subunits (e.g., Office of Educational Research and Improvement), have an entry in this field.

HISTORICAL NOTE: Prior to May 1980, the Federal agency responsible for education was the Office of Education, a part of the Department of Health, Education, and Welfare (DHEW). After that date, the Department of Education (ED)—a separate department—assumed responsibility for education. Federally funded education documents not bearing a Departmental designation by name or contract number should be assigned to DHEW or ED name forms based on the May 1980 date.

At the same time that DHEW went out of existence in May 1980, the Department of Health and Human Services (DHHS) was created. Documents produced by it or one of its subunits (e.g., National Institutes of Health, Administration of Children, Youth, and Families, etc.) dated May 1980 or later should have those codes assigned which incorporate the DHHS change.

The same argument holds for all such organizational name problems created by governmental reorganizations.

If a document cites so many financial supporters that it is not practical to catalog them all, one or more of the major supporters may be cataloged selectively. Other organizations may be referenced in the Note field.

SUMMARY OF SIGNIFICANT RULES

1. The Sponsoring Agency data element identifies the organization(s) that has funded the effort reported in the document. Multiple sponsors may be cited, each in its own subfield.

2. All organizations cited as funding sources should be cataloged in the Sponsoring Agency field. However, if there is a principal funding source and many secondary funding sources, the catalogers, at their discretion, may choose to catalog only the principal sponsor. Sponsors whose help is only "collaborative," "coordinative," "supportive," (i .e. , only nominal) need not be cataloged.

3. All Sponsoring Agency names used must agree with the standard established name forms cited in the ERIC *Source Directory*. Existing names are entered by means of codes that represent the names in the ERIC *Source Directory*. If the name is new and not previously established, it should be formatted generally in accordance with *Guidelines for Descriptive Cataloging of Reports*, Section 2: Organization Name. (See **Attachment 3**.) All standardized names are based on the pattern: largest element-geographic location-smallest element.

4. Sponsoring Agencies should not be confused with preparing institutions or Personal Author's corporate affiliation.

5. Entries in the Contract Number field generally require a corresponding entry in the Sponsoring Agency field. Particular care should be taken to ensure that all reports resulting from Department of Education funding have an entry in this field.

6. The standard two-character postal codes should be used for abbreviating state names.

7. Organizations that perform the functions of both Sponsor and preparing Institution are listed only once, under Institution. Do not list the same organization in both the Institution and Sponsoring Agency fields.

EXAMPLES

See the examples provided under the Institution data element (Section V).

B.24 TITLE

Profile

Data Element/Field - Title
Data Entry Tag/Keyword - TITLE_
Files - RIE/CIJE
Mandatory/Optional - Mandatory
Data Provided By - Clearinghouse
Character Set - Alphabetic, Numeric, Special
Subfields Permitted - No
Field Length - 4 (Min.); 500 (Max.); 83 (Avg.)
Field ID No. (Tape) - 25

TYPICAL ENTRY

TITLE_Science Achievement and the Minority Student. Recommendations of the Committee on the Future of American Education.

a. General

The Title field should contain the complete title of the document or journal article, including alternative title, subtitle, parallel title, English translation of non-English title, series title, proceedings information, "Report covering the period..." statement, edition statement, and other associated descriptive matter usually found on the title page or cover preceding the author, organizational auspices, and other imprint information.

Because of the fugitive nature of the literature entering the ERIC database, the determination of the appropriate title is one of the most challenging tasks a cataloger faces. Fortunately, problem titles constitute only approximately 10% of all titles.

b. Main Title/Title Proper

The complete document title, as found on the title page, is entered. If the title page of the document is lacking, the cover title must be used as a second choice. In the case of the somewhat informal report literature, the title page and the cover are frequently the same piece of paper, in which case there is no problem. However, it also happens on occasion that the title appearing inside the document (for example, at the top of the first page of the text) varies from the title appearing on the outside cover of the document. In these cases, the cataloger must decide whether the outside cover should in fact be considered the official title page. This will usually depend on the extent of other bibliographic data presented on the page (e.g., Author, Publication Date, Institution, etc.). If the cover does include most of the bibliographic data and it is obviously the determiner of the way the document is likely to be known and identified, then there is no problem. However, if the cover is merely a brief non-substantive eye-catcher, at variance with an internal fully descriptive title, then the standard library practice of relying on the inside title page over the cover should be followed. This question of cover vs. title page is not an easy one, and guidelines are difficult because of the large number of troublesome variations that can be encountered. If the Title on the title page and the title on the cover do not agree in all respects, catalog the title page title and refer to the "cover title" in the Note field. This provides for retrieval on the second (unselected) title.

Example:

Title page reads: "The Role of Paraprofessionals in Utah Schools."
Cover reads: "Paraprofessionals in the Public Schools of Utah."

TITLE_The Role of Paraprofessionals in Utah Schools.
NOTE_Cover title: "Paraprofessionals in the Public Schools of Utah."

The general rule for the recording of a Title is to record the title proper exactly as to wording, order, and spelling, but not necessarily as to punctuation and capitalization. (For more on punctuation and capitalization, see the last part of this Section.)

This rule requires that initial articles in the Title are to be recorded and are not to be dropped. For purposes of printed index production, however, the ERIC computer system prints but ignores initial articles in any sorting/filing done by Title.

c. Alternative Titles

An alternative title is the second part of a Title that consists of two parts, each of which is a Title in itself. An alternative Title should be cataloged as if it were part of the main Title, e.g.:

TITLE_The Tempest, or, The Enchanted Island.

Note, however, that the first word of an alternative title should be capitalized.

d. Parallel Titles

A parallel Title is the main Title repeated on the document in another language. Typically such parallel Titles appear on bilingual or multilingual documents. These Titles should not be confused with Titles which are translated by the cataloger (see the discussion which follows). Standard library procedure is to place an equals (=) sign between parallel titles, e.g.:

TITLE_Creating a Love of Reading = Susciter le Gout de la Lecture.

e. Non-English Titles

If a document is in a language other than English, enter the Main Title in the language of the document. Follow this with the English translation in parentheses, as in the following example:

TITLE_L'emploi des connecteurs francais dans l'expression d'etudiants Chinois: Observation et analyse (The Use of French Connectors in the Expression of Chinese Students: Observation and Analysis).

A non-English title generally should be cataloged in its complete form followed by the complete translation in English; that is, do not jump back and forth in the title between non-English and English. If a document is a conference proceedings and the title is very lengthy, the information concerning the conference number, location and date can be cataloged once in English.

While significant words in the Titles of works in English are commonly capitalized and prepositions and conjunctions are lower-cased, non-English Titles do not necessarily follow this practice. The simplest rule to follow is to emulate the practice of the document itself.

The Titles most commonly at variance with English usage are French titles. French practice is to lower-case the words in titles, except for proper names. If the non-English Title appears in the document only in upper case, follow the guidelines for capitalization found in the *GPO Manual*, *Chicago Manual of Style*, or *Anglo-American Cataloguing Rules*. Titles should generally not be recorded in all upper-case, unless they consist solely of acronyms.

If a document is in Cyrillic (e.g., Russian) characters, transliterate the Title into Roman characters in accordance with Z39.24 System for the Romanization of Slavic Cyrillic Characters. Additional Z39 transliteration standards exist for: Japanese, Arabic, Hebrew, Lao/Khmer/Pali, and Armenian.

If a document cites its Title in both the language of the document and in English, this would be considered a parallel Title and should be entered according to the rules provided in the earlier discussion of parallel titles.

Titles in English, containing a reference to a non-English phrase or word, need not translate the non-English component.

f. Acronyms/Abbreviations in Titles

Acronyms and/or abbreviations which are part of the Title should NOT be spelled out in the Title unless the Title Page or Cover actually does so. If the acronym or abbreviation is not spelled out in the Title, and if it is not clear on the basis of information in other fields, then the "translation" should be worked into the Abstract.

TITLE_Educational Goals in SREB States.

g. Fabricated Titles/Supplied Titles

If no title can be found, one must be fabricated on the basis of an examination of the document. The table of contents, chapter headings, and conclusions can be helpful in supplying a Title. When a Title is fabricated, all the text that is supplied must be enclosed in square brackets, e.g.:

TITLE_[Nature vs. Nurture.]

h. Subtitles

The subtitle is considered a part of the Title and is transcribed in the same manner as the Title proper. A subtitle preceding the title on the title page is transposed to follow the main title. Title may be separated from subtitle by a semicolon, comma, colon, period, question mark, or exclamation mark. The first choice is to follow the actual punctuation used on the document. Where the document provides no explicit guidance, punctuation of the Title/Subtitle combination will be necessarily subjective and will depend on how the cataloger reads and interprets the Title.

NOTE: Standard library practice, following the International Standard Bibliographic Description (ISBD) and the *Anglo-American Cataloguing Rules*, is to separate major units of Title information by a colon, e.g.:

TITLE_Global Changes and American Citizenship Education: The Vital Role of History.

ERIC has not incorporated ISBD guidelines into its cataloging practice and therefore the punctuation between Title and Subtitle in ERIC records will vary.

Some examples of Title/Subtitle combinations, with varying punctuation, follow:

TITLE_Everybody's Business. A Book about School Discipline.

TITLE_Analyzing Media: Metaphors as Methodologies.

TITLE_Where Is Geography? Three Studies of Thinking and Teaching.

TITLE_How Dare You! The Art of Bluffing.

TITLE_Winterthur, An Adventure in the Past.

TITLE_"Kilroy Was Here." An Analysis of a World War II Myth.

- Report Statements (as Subtitles)

  Information relating to the type of report and period covered by the report is considered part of the Title and is entered in the Subtitle position, as shown in the following examples:

  TITLE_Mexican-American Study Project. Revised Prospects.

  TITLE_Essex County College Cost Fact Finding Committee. Final Report.

  TITLE_Focus on Refugees. Draft Statement.

  TITLE_The Hispanic Female Head of Household. Interim Report.

  TITLE_Families in Turmoil. Transcript.

TITLE_Urban Education Network. Progress Report from the Period May 1991 - April 1992.

TITLE_Federal-State Environmental Programs. Report to the Congress by the Comptroller General of the United States.

TITLE_School Funding for New York State. Commission Staff Report.

A report statement preceding the Title proper on the Title Page is transposed to the Subtitle position.

Non-distinctive Report Numbers, and those that cannot be reduced to a form suitable for the Report Number field (i.e., that do not have an alphabetic prefix), are cataloged as Report Statements, e.g.:

TITLE_Store Management Guide. Information Leaflet No. 224.

TITLE_Vocational Assessment. Policy Document 6.

TITLE_Research Methods in Interlanguage Pragmatics. Technical Reports 10 and 11.

The words "Number," "Numbers," "No.," "Nos." are normally transcribed as they appear on the Title Page, and are not arbitrarily added in cases where they are missing.

- Edition Statements (as Subtitles)

Information relating to the edition, revision status, volume, part, etc., of the document is considered part of the Title and is entered as shown in the following examples:

TITLE_Focus on Refugees. Second Edition.

TITLE_Focus on Refugees. Revised Edition.

TITLE_Focus on Refugees. New Edition.

TITLE_Focus on Refugees. Partly Revised.

TITLE_Focus on Refugees. New Edition Revised and Enlarged.

TITLE_Focus on Refugees. Volume 3.

TITLE_Focus on Refugees. Volume IX.

TITLE_Focus on Refugees. Part V.

- Series Titles (as Subtitles)

A series is a number of separate works issued in succession, and related to one another by the fact that each bears a collective Title (generally appearing at the head of the Title Page). They are normally issued by the same publisher or institution, in a uniform style, and are frequently in a numerical sequence. A document issued in several parts or volumes with the same title is not considered a series.

The series Title should be entered following the specific Title of the document. The series statement include: the distinctive collective Title, and, in a numbered series, the number of the particular document, as in the following examples:

TITLE_A Report on the Low Ability Student at Miracosta College. Student Personnel Studies, Section G.

TITLE_Facilitating Learning and Individual Development, Toward a Theory for Elementary Guidance. Minnesota Guidance Series.

TITLE_Teaching Rhythm. Music for Today, Series 2, No. 8.

TITLE_The London Times. Great Newspapers Reprinted No. III.

TITLE_Supporting Leaders for Tomorrow. Occasional Paper No. 1.

i. Multi-Volume Documents

If a document is issued in several volumes or parts under one Title, enter the main Title and add the volume or part number (and the distinctive Title of the particular volume, if any), as in the examples below:

TITLE_A Potpourri of Ideas for Teachers of At Risk Students. Volume II, Early Childhood Education.

TITLE_Curriculum for Geographic Instruction. Parts 1-5.

TITLE_The Academic Market in the 21st Century. Volumes 1 and 2.

NOTE: It is not necessary to bracket supplied connectives, like "and" above.

TITLE_NSF's Role in Science Education. Volume IV, Cognitive Processes. Volume V, Commissioned Papers.

TITLE_Financial Funding for Schools: 9. A Review of a National Survey.

TITLE_State Survey of Mathematics Achievement. Final Report and Executive Summary.

TITLE_Helping Children At Risk Bibliography, with Supplements 1 and 2.

TITLE_Improving Your Geographic Literacy. Teacher's Edition and Student's Manual.

Occasionally, several documents with variant titles are packaged together to make one accession. There is usually a close relationship among the documents which produces a rationale for such grouping. [For example, a document is comprised of three brochures, all from the American Council on Science and Health and all involving advice on the intake of food and drink. Each brochure alone would probably have been too slight to be acceptable for RIE, but all three together, having a unity of subject matter, can make a reasonable accession.] Since each brochure had an individual Title, each should be in the Title field, rather than create a fabricated title, as follows:

TITLE_Alcohol Use during Pregnancy [and] Fast Food and the American Diet [and] Food Additives and Hyperactivity.

NOTE: Here brackets have been used around the supplied connectives to clarify the existence of three separate documents, especially since the individual Titles also contain connectives.

The Abstract would, of course, further elaborate on the existence of separate works.

j. Conference Proceedings Titles

When the entire proceedings of a conference, workshop, seminar, or other meeting, are entered, the Title should be taken verbatim from the Title page, except that the number of a conference appearing in the Title should be removed from its position and placed in parentheses after the Title, as shown below:

TITLE_Summary of the Proceedings of the Working Conference on Language Development in Disadvantaged Children (10th).

When the date and/or place of the conference also appear in the Title, or are clearly indicated on the Title page or elsewhere in the document, they should also be moved and included in the parentheses in standard form in the order: number, place (city/town;, state/province; country, if non-U.S.), date, as found in the following example:

TITLE_Collective Bargaining in Higher Education: The 1990's. Proceedings of the Annual Conference (18th, New York, New York, April 23-24, 1990).

Street addresses and the names of conference sites such as universities, convention centers, and hotels at which meetings are held are not cataloged. Unlike the data entered in the Note field, state names are not abbreviated in the Title field unless they are abbreviated on the document.

NOTE: *When individual papers or speeches (as opposed to complete conference proceedings) are entered into the system, they are cataloged under their individual Title and all descriptive information relating to the conference or meeting at which the paper or speech was presented is entered in the Note field. (See the discussion under NOTE in Section V.)*

k. Congressional Hearing Titles

Hearings of the Senate and House of Representatives of the U.S. Congress and their various Committees should include in the Title field information as to the number and session of the Congress, as shown in the following example:

TITLE_Oversight Hearings on Educational Assessment. Hearings before the Subcommittee on Elementary, Secondary, and Vocational Education of the Committee on Education and Labor. House of Representatives, One Hundred Second Congress, First Session (March 13-14, 1991). *[Date of Hearings may be omitted from Title if it is only a single date and is same day as used for Publication Date.]*

NOTE: Since the vast majority of hearings are held in Washington, D.C., the geographic location of hearings should be recorded as part of the title only when they are not held in Washington, D.C. (see Examples).

Titles of Congressional hearings can be quite lengthy; however, all of the Title should be recorded unless the Title will exceed field space limitations. This means that, if the Title includes a brief statement of what a particular act or bill is intended to do, this information should be part of the Title unless it would cause the Title to truncate. In extremely long Titles, ellipses may be used, but only AFTER the first line of the Title (to do so before would prevent duplication validation). Data giving intent or other description of the legislation not incorporated in the Title field should be included in the Abstract.

Congressional hearings are not consistent in how they handle the number and session of Congress; in some instances the information is spelled out, i.e., "One Hundred Second Congress, First Session," and in others, the information is shortened, i.e., "102nd Congress, 1st Session." Whatever format is on the Title page should be followed.

l. Journal "Theme Issue" Titles

If an entire journal issue devoted to a single topic is being cataloged as if it were a monograph, the journal name goes as usual in the Journal Citation field (see Section V under JNL) and the "Theme" Title should be used as the title of the "monograph," e.g."

TITLE_Education in Urban America.
JNL_American Education Today; v23 n4 Dec 1991

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m. Journal "Runs"

If an entire volume of a serial, e.g., all of the twelve issues of a non-CIJE journal, are collected and entered as one document, the Title of the journal will be entered in the Title field and entered in the Journal field as well:

TITLE_American Education Today. 1991.
JNL_American Education Today; v23 n1-4 1991

n. Dates as Part of a Title

While dates frequently may appear on a Title page to be part of a Title, their inclusion in the Title field and not in the Publication Date field depends on the specific document being processed.

Example:

TITLE: A Survey of School Funding in Massachusetts, 1989.
PUBLICATION DATE: 1991

The Title field would include the date "1989" since the publication date is quite different from date of survey. If the publication date were 1989, the date would normally be omitted from the Title field.

Annual or recurring publications (e.g., 1989-90 Enrollment Statistics for Montgomery College, 1990-91 Enrollment Statistics for Montgomery College) would be entered as:

TITLE_Enrollment Statistics for Montgomery College, 1989-90.
TITLE_Enrollment Statistics for Montgomery College, 1990-91.

Transposing numbers with the text, such as in the above titles, allows for like citations to be more easily retrieved and duplicate checked. Normally Titles should not begin with dates such as Fiscal Years, FY, Reporting Periods, etc. If the date is an integral and "unmovable" part of the title, i.e., "1991: A Bad Year for Federal Funding of Education," then it would be cataloged as on the Title page.

o. Institutional Information in the Title

Some Titles may include corporate author (Institution) or other similar information; for example, "Level of District Funding in Ohio. Report of the Governor's Committee to Evaluate School District Funding" contains corporate author information. In this instance the "institutional" information should be retained in the Title since the Committee appears to be a transient institution which would not normally have a code. On the other hand, if the Title included a statement "Report of the Ohio Department of Education," only the word "Report" would be retained in the Title field as "Ohio Department of Education" would be entered and displayed separately as the corporate author.

p. **Duplicate Titles**

(1) **Different Documents**

Different documents with duplicate Titles do occur. Sometimes they are produced by different preparers out of sheer coincidence. Other times they occur simply because the preparer did not vary the Title of a preliminary report from that of a final report. Sometimes they occur unnecessarily because a cataloger did not catalog a truly complete Title statement, or because the cataloger incorrectly cited the series Title (common to many items) before the unique main Title.

It is always helpful to the user if such items can be differentiated from one another. This is best done if the Titles themselves can be made to vary in some legitimate way. Sometimes this can be done by the addition to the Title of such distinguishing information as:

Volume 1, Volume 2
Final Report, Interim Report
Preliminary Edition, Final Edition
January 1992, March 1992
#1, #2
1990, 1991
Sixth Edition, Seventh Edition
Supplement, Second Supplement

Where this can legitimately be done without doing violence to the rules of cataloging, it should be done. When the Titles can be varied in some informative way, the user is benefitted in a number of instances: *Title Index* entries, microfiche headers, abbreviated online search output, etc. In all these cases, duplicate Titles are troublesome to the user because accessions become hard to tell apart without additional research. A small variation at the end of the Title, placed there by a helpful cataloger, can sometimes bypass such problems altogether.

(2) Duplicate Documents

In the above situation, the problem is that two different documents may not be distinguishable if they end up with the same title. There are other instances where the danger is that two duplicate documents may not be detected because their titles are cataloged differently. This usually occurs because of variations in recording subtitles. The following examples are of some situations to be guarded against, where duplicate subtitles were recorded differently by different catalogers, thereby creating, as far as the computer is concerned, different items:

[Subtitle].	Phase I of...
[Subtitle].	Phase 1 of...
[Main Title].	Awards and Prizes.
[Main Title].	Awards & Prizes.
[Subtitle].	Fastback Series No. 64.
[Subtitle].	Fastback Series 64.
[Subtitle].	Final Report 1974-75.
[Subtitle].	Final Report.
[Main Title].	Are They Helping Children?
[Main Title].	Are They Helping Children? A Report.
[Subtitle].	Evaluation Report, FY73.
[Subtitle].	FY73 Evaluation Report.

q. Long Titles

The size limitation on the Title field is 500 characters. The vast majority of document titles do not approach this size and can be recorded in their entirety without any problem. On rare occasions, however, a title page is so communicative that it becomes necessary to truncate an excessively long title at a logical break point.

The following title is an actual example that exceeds 500 characters in its natural state. One possible truncation is shown in the example:

TITLE (Over 500 Characters)	Assessment of the school career and health record for children attending school abroad. 2nd part. Consisting of appendices to the preliminary report on national experience acquired in the use of the school career and health record: i. Questionnaire sent to national administrations; ii. Request for further information on the record (CD 15); iii. "The use of the school career and health record as proposed by the Council of Europe - An evaluation survey." Preliminary report for the European Commission.

ACCEPTABLE TRUNCATION BY CATALOGER	Assessment of the School Career and Health Record for Children Attending School Abroad. 2nd Part. Consisting of Appendices to the Preliminary Report on National Experience Acquired in the Use of the School Career and Health Record:...Preliminary Report for the European Commission.

r. **Punctuation and Capitalization of Titles**

- Initial articles, prepositions, and conjunctions are retained and capitalized.
- All words in English titles are written with initial capitals except for articles, prepositions, and conjunctions (e.g., the, to, in, and, but, as, etc.) that are not first words. (For other exceptions see sections on Alternative Titles, Parallel Titles, and Non-English Titles.) However, "to" is capitalized when used as the first element of an infinitive.
- All special characters in the ERIC Character Set may be recorded as used on the document, including the question mark and exclamation mark.
- Words in the title are not abbreviated unless abbreviated on the document; at the same time, abbreviations appearing in the title are not gratuitously spelled out.
- Titles may include numbers in any position. Care should be taken not to key the lower case "l" (el) instead of a genuine "1" (one) and not to key an "O" (oh) instead of a genuine "0" (zero).
- Punctuation between Main Title and Subtitle may be a comma, semicolon, colon, dash, period, question mark, or exclamation mark, depending on the usage of the document or the judgment of the cataloger as to the appropriate punctuation. In the Title field the semicolon does not function as a subfield delimiter.
- Parallel titles are separated by an equal sign (=).
- Fabricated or supplied titles are enclosed in square brackets.
- All titles should normally end with a period. There are three exceptions: (1) supplied title, in which case title and concluding period are enclosed in square brackets; (2) title ends with a quotation mark, in which case the *GPO Style Manual* calls for the period to come inside the quotation mark; (3) title ends in a question mark or exclamation mark.

SUMMARY OF SIGNIFICANT RULES

1. The title proper should be transcribed exactly as to wording, order, and spelling, but not necessarily as to punctuation and capitalization.

2. Titles should be recorded as on the document and should not be changed arbitrarily, e.g., (1) to make a "maverick" title conform to the others in a related group, or (2) to change state names to the two-character postal abbreviation. However, conference proceedings data (number, place, date) are standardized and placed in parentheses.

3. Phrases designating a "Final Report" or "Progress Report" should be placed in the subtitle position (along with the period covered). Series titles should be placed in the subtitle position and should generally not precede the distinctive specific title for the document in hand.

4. Non-English titles must be translated for the benefit of ERIC users. If the ERIC document processor provides the English translation, it is appended in parentheses to the real title. If, however, the document provides its own translated title, it should be treated as a "parallel title" (q.v.), without parentheses.

5. When complete conference proceedings volumes are being entered as single accessions, it is appropriate to put the complete conference information in the Title field. However, when single papers from conferences are being entered, each paper will have its own title and the conference information will then descend to the Descriptive Note field.

6. "Theme issues" of journals being entered as single accessions on single subjects (i.e., as monographs) should have their titles cataloged as the "theme title" (and not the journal title). The journal title will, of course, be cataloged in the Journal Citation field.

7. Wherever feasible, documents with duplicate titles should have those titles differentiated by the addition of some distinguishing feature, e.g., Final/Interim; #1/#2; 1975/1976; Sixth edition/Seventh edition; Supplement; Volume 1/Volume 2; Preliminary/Final; etc.

8. Titles are limited to 500 characters. Titles exceeding that limit should generally be truncated by the cataloger at some logical break. If this is not done, the computer system will simply stop the title at 500 characters.

9. If no title exists, one must be supplied. Fabricated/supplied titles must be enclosed in square brackets.

10. In the area of punctuation and capitalization: initial articles are retained; words in the title are not abbreviated or spelled out unless abbreviated or spelled out on the document; words in the title are written with initial capitals except for articles, prepositions, and conjunctions that are not the first word in a title; titles normally close with a period. The semicolon does not function in this field as a subfield delimiter and may be used as a normal element of punctuation.

11. The title entered on the preliminary duplicate checking tool, the Acquisitions Data Report (ADR), and the title ultimately selected for final cataloging, may not always agree. The ADR Title, which may be recorded by non-cataloging staff, should, in general, adhere to EPM conventions when possible, but the final cataloged title should never be "forced" to match the preliminary ADR title when the ADR Title is clearly incorrect or inaccurate.

EXAMPLES

ALTERNATIVE TITLE	The Tempest, or, The Enchanted Island.
NON-ENGLISH LANGUAGE TITLE	Lecciones de Quechua (Quechua Lessons).
PARALLEL TITLE	Road Map of Switzerland = Carte routiere de la Suisse.
ROUTINE TITLE	Critical Events Shaping Women's Education.
SUPPLIED TITLE	[NUEA Correspondence Study.]
TITLE OF CONFERENCE PROCEEDINGS	Proceedings of the Annual Foreign Language Conference (31st, Columbus, Ohio, November 13, 1991).
TITLE OF CONGRESSIONAL HEARINGS	Oversight Hearings on Educational Assessment. Hearings before the Subcommittee on Elementary, Secondary, and Vocational Education of the Committee on Education and Labor, House of Representatives, One Hundred Second Congress, First Session (Chicago, Illinois, March 13-14, 1991).
TITLE OF ONE DOCUMENT IN MULTI-VOLUMES	NSF's Role in Science Education. Volume IV, Cognitive Processes. Volume V, Commissioned Papers.
TITLE OF ONE VOLUME OF MULTI-VOLUME DOCUMENT	Teaching the Mentally Retarded. Volume II, The Practical Arts.
TITLE WITH EDITION STATEMENT	Focus on Hmong Refugee Education. Second Edition.
TITLE WITH REPORT STATEMENT	The Urban Education Network. Progress Report for the Period May 1991-April 1992.
TITLE WITH SERIES TITLE	Facilitating Learning. Minnesota Guidance Series No. 5.
TITLE WITH SUBTITLE	Critical Events Shaping Women's Education. A Handbook for Reducing Sex Bias in the Curriculum.

LIST OF ATTACHMENTS

ATTACHMENT 1: OBSOLETE/DISCONTINUED FIELDS

A. Grant Number
B. Project Number
C. Program Area Code

ATTACHMENT 2: CATALOGING SPECIFIC TYPES OF DOCUMENTS

A. Analytics

ATTACHMENT 3: CENDI/COSATI GUIDELINES FOR ORGANIZATION NAME(S)

ATTACHMENT 1:

OBSOLETE/DISCONTINUED FIELDS

GRANT NUMBER

Profile

Data Element/Field - Grant Number
Data Entry Tag/Keyword - GR_
Files - RIE
Mandatory/Optional - Optional
Data Provided By - Clearinghouse
Character Set - Alphabetic, Numeric, Special
Subfields Permitted - Yes
Field Length - 85 (Max.); 16 (Avg.)
Field ID No. (Tape) - 47

TYPICAL ENTRY (RIE Only)

GR_NE-G-00-3-0006

NOTE: *This field was merged with the Contract Number field beginning with the January 1991 issue of RIE (ED 322 286). Entries in the Grant Number field prior to that time have not been merged into the Contract Number field.*

Grant Numbers are alphanumeric tags representing instruments through which financial support was given the work or research reported in documents. At one point a distinction could be made between Grants and Contracts in that the scope of work of a grant was usually broader and more general and did not contain lists of specific tasks and deliverables. A contract, on the other hand, usually specified certain tasks or contract-deliverable items, and the contracting agency monitored the effort to ensure that all contractual obligations were met.

Over time, the distinction between the two became "fuzzy," additional funding instruments were introduced (e.g., "Cooperative Agreements"), and the numbers for grants and contracts became difficult to tell apart. Now, *all* types of funding instruments are recorded in the one Contract Number field.

Through June 1976 (ED-118 719), the Grant Number field was restricted to grants of the Office of Education and the National Institute of Education (NIE).

When the field was active, the rules fdr cataloging Grant Numbers were essentially the same as those for cataloging Contract Numbers.

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PROJECT NUMBER

Profile

Data Element/Field - Project Number
Data Entry Tag/Keyword - BN_
Files - RIE (Inactive; Discontinued in 1982)
Mandatory/Optional - Optional
Data Provided By - Clearinghouse
Character Set - Alphabetic, Numeric
Subfields Permitted - No
Field Length - 64 (Max.); 9 (Avg.)
Field ID No. (Tape) - 48

TYPICAL ENTRY (RIE Only)

BN_BR-5-8047
BN_V361123L; 498AH800003

NOTE: *This data element was discontinued in 1982.*

A Project Number is an alphanumeric code assigned by the Sponsoring Agency to the project under which the document in hand was produced. Project Numbers should not be confused with Contract/Grant Numbers.

Historical Note: *This data element was in use through June 1982. During this time only U.S. Office of Education and U.S. Department of Education Project Numbers were cataloged. Early U.S. Office of Education contractor reports utilized a Project Number beginning with the prefix "BR" (standing for Bureau of Research), e.g., BR-5-8047. This format was later discontinued. No unified Project Number system exists for all Department of Education components and many components do not use Project Numbers at all. For this reason, and because Project Numbers appear on documents so infrequently, this data element has been made inactive. This field was used in approximately 7,300 records.*

PROGRAM AREA CODE

Profile

Data Element/Field - Program Area Code
Data Entry Tag/Keyword - PA_
Files - RIE
Mandatory/Optional - Optional
Data Provided By - Clearinghouse
Character Set - Numeric
Subfields Permitted - No
Field Length - Fixed Length
Field ID No. (Tape) - 20

TYPICAL ENTRY (RIE Only)

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PA_32
```

NOTE: *This data element was discontinued in 1979.*

The two-digit numeric Program Area code was established to identify the legislative authority under which the project producing the document was funded. Unfortunately, relatively few documents made a practice of citing their authorizing legislation. As a result, the code appeared infrequently in RIE records, and, in 1979, it was dropped entirely and labeled inactive.

When in use, the Program Area Code was entered as shown in the typical entry above. This data element does not appear on the vendor files.

ATTACHMENT 2:

CATALOGING SPECIFIC TYPES OF DOCUMENTS

I. Introduction

The intent of Attachment 2 is to gather in one location complete information concerning the processing of specific, frequently encountered types of documents. The first such "holistic" write-up covers "Analytics". Additional Types will be added to this Attachment as needed, e.g., composite documents (one or more separately published documents combined into a single accession).

II. Specific Types of Documents

A. Analytics

1. Definition

An analytic is a part of a larger document. The part is treated and processed as if it were a separate document. The part is spoken of as being *analyzed out* of the larger document. The larger document is often referred to informally as the "*parent*" and the parts as the "*children*". A larger document (e.g., a conference proceedings) may be analyzed comprehensively (i.e., all parts processed) or selectively (one or more parts processed, but not all).

2. Selection Criteria (Deciding to Analyze)

Analytics must abide by all of the regular rules for documents, e.g., they must be duplicate checked, they must be physically complete and reproducible, etc. However, there are some additional criteria applicable specifically to analytics:

a. Size

Small documents (≤ 50 pages) that would result in "undersized" children (≤ 5 pages) should rarely be analyzed.

b. Multi-Subject Coverage

A document, each of whose parts covers essentially the same topic, should generaly not be analyzed. If analytic parts are all on the same topic (e.g., "clones"), they might as well be treated as one unit (as published). The intent of analytics is to enhance retrieval by treating individually parts that are *different*. If the parts are not very different from each other, there is little point to the separate treatment. A conference proceedings, where the papers cover a wide range of different topics, would be a good candidate for analysis.

c. Reproduction Release Obtained

The parent document must be at Level 1 or 2. Documents at Level 3 may not be analyzed since this creates a proliferation of entries for items ERIC cannot provide.

Unless a part carries its own separate copyright notice, the reproduction release permission obtained for the parent is considered to extend automatically to the each of the parts.

3. Copy Requirements (for microfilming)

Each part analyzed out of a parent document must be input as its own separate and distinct physical document. This necessitates either obtaining a second copy of the parent (which may be dismembered) or making a photocopy (from the parent) of the analyzed parts.

4. Accessioning

Analytics should be accessioned in the same sequence in which they appear in the parent document, beginning with the next accession number immediately after that of the parent.

5. Shipping

Parent documents and their analyzed parts should as a rule be sent together in the same week's shipment. If the number of analytics is so large that the Clearinghouse wants to spread the input across two weekly shipments, the Facility should be alerted in advance. Facility processing of analytics is delayed until all parts from a given parent are in hand. As with all "related documents," analytics must appear together in the same RIE issue.

6. Parent Document Created by Clearinghouse

Sometimes a conference results in a large number of separate conference papers, but not in a unified, published "Proceedings" volume containing these papers. Sometimes, to benefit the end users, and perhaps as part of a cooperative agreement with the conference sponsor, a Clearinghouse will decide to assemble and combine these various papers to create an artificial "Proceedings" volume (with a Clearinghouse-created title page and table of contents). Some or all of the papers so assembled may legitimately also become analytics, even though the "parent" document in this case had no previous existence before Clearinghouse processing.

7. Sample Records

See **Figure V-2-1** for an example of a resume (selected fields) for a Parent document, with a NOTE_ referring to the parts that have been separately analyzed.

See **Figure V-2-2** for an example of a resume (selected fields) for an Analytic, with a NOTE_ field referring to the Parent document from which it has been extracted.

Sample Resume (Selected Fields) for Parent Document

CH_FL123456[1]
TITLE_Language Proficiency for America in the 21th Century. Proceedings of the Annual Conference of the Association of Language Teachers (10th, New York, NY, May 3-5, 1991).
AUTH_Jones, Matilda T., Ed.; Swanson, Bruce, Ed.
INST_BBB123456=Association of Language Teachers, Atlanta, GA.[2]
NOTE_For individual conference papers, see FL 123 457-465.[3]
PUBTYPE_021
GEO_U.S.; Georgia
ABST_Selected papers from the 1991 the annual conference of the Association of Language Teachers are presented. The theme of the conference was preparing students in the United States to be proficient in foreign languages in the next century. The papers are: "Restructuring the Elementary Foreign Language Program (Donaldson, Sarah);...[4]

FIGURE V-2-1: Sample Resume (Selected Fields) for Parent Document

Sample Resume (Selected Fields) for Analytic

CH_FL123457[1]
TITLE_Restructuring the Elementary Foreign Language Program.
AUTH_Donaldson, Sarah
PUBTYPE_150
NOTE_In: Language Proficiency for American in the 21st Century. Proceedings of the annual Conference of the Association of Language Teachers (10th, New York, NY, May 305, 1991); see Fl 123 456.[5]
GEO_U.S.; Ohio[6]

FIGURE V-2-1: Sample Resume (Selected Fields) for Analytic

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[1] Parent document should be accessioned *before* the children.

[2] Although the Institution is cataloged for the parent, normally it is not also used for the analytics, as the conference organization typically is not responsible for the content of individual conference papers.

[3] The note format should be succinct.

[4] Whenever possible, use a Table of Contents type abstract for parents, that can, in effect, act as an index to the analytics.

[5] For individual papers, cross reference back to the parent document; it is not necessary to cross reference children to children.

[6] For individual papers, the GEO field should be cataloged with the geographic location of the author of the paper; do not use the parent document's location for this field.

ATTACHMENT 3:

CENDI/COSATI GUIDELINES FOR "ORGANIZATION NAME(S)" [1]

2.0 ORGANIZATION NAME(S)

2.1 DEFINITION: Names of the corporate bodies associated with the report. Two types of organizations are associated with reports: the corporate author, the institutional or corporate body preparing the report and performing or contractually responsible for the work; and the monitoring or funding agency, the organization responsible financially for the report or sponsoring the work, and controlling distribution of the report.

2.2 PURPOSE: To identify organizations associated with the report in a standard manner, thus to facilitate bringing together all reports generated or sponsored by a specific organization.

2.3 CONTENT: There are two distinct cataloging functions associated with an organization name. One, performed by cataloging staff wherever technical reports are processed, consists of adding appropriate names to a document citation. This is done by choosing from an authority list of organization names the numeric code(s) for the name(s). All codes that apply are recorded. Narrative entries of the names corresponding to the codes are generated automatically by computer.

The other function consists of formatting the narrative entry of the name for addition to the authority list. Maintenance of the authorities is the responsibility of the four CENDI agencies; preliminary entries may be submitted by other cataloging sites, to be verified by CENDI agencies before being added to an authority file. Rules for formatting these entries are given below. These rules are followed by the CENDI agencies and will assist other catalogers preparing tentative entries for CENDI review.

2.3.1 Selection of Elements of Organization Name Headings: General Rules

2.3.1.a

Only two organizational elements may be chosen. They are usually selected from the title page or the cover page of the report.

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[1] This attachment is a photocopy of Section 2.0 "Organization Name(s)", extracted from *Guidelines for Descriptive Cataloging of Reports. A Revision of COSATI Standard for Descriptive Cataloging of Government Scientific and Technical Reports.* Washington, DC, Commerce, Energy, NASA, Defense Information (CENDI) Cataloging Committee, 1985, 100p. (PB86-112349).

2.3.1.b

When two elements are chosen, they are the largest and the smallest elements; the city and state name of the smallest element follows the largest element of the organization heading.

APPEARS AS:	ENTER AS:
General Electric Co., Syracuse, NY, Tube Department. Imaging Devices Operation.	General Electric Co., Syracuse, NY. Imaging Devices Operation.

2.3.1.c

This selection of elements may vary if a smaller element includes a proper name (see 2.3.3.a); if a smaller name is the name of an independent company or a major government bureau of service (see 2.3.3.b); or if the report series number assigned by the originator indicates a different level of editorial responsibility (see 2.3.3.c).

2.3.2 Selection Of Elements of Organization Name Headings: Specific Rules

2.3.2.a

U.S. is omitted before government headings

APPEARS AS:	ENTER AS:
U.S. Coast Guard, Washington, D.C.	Coast Guard, Washington, DC.
United States Geological Survey, Reston, VA.	Geological Survey, Reston, VA.

2.3.2.b

City or state names which repeat part of the name of the main element are omitted.

APPEARS AS:	ENTER AS:
Massachusetts Institute of Technology, Cambridge, MA.	Massachusetts Inst. of Tech., Cambridge.
University of Rochester, Rochester, NY.	Rochester Univ., NY.

2.3.2.c

If the subelement includes a geographic name, the geographic name is repeated as part of the subelement.

APPEARS AS:	ENTER AS:
Burroughs Corporation, Radnor, PA, Radnor Division.	Burroughs Corp., Radnor, PA. Radnor Div.

2.3.2.d

State names are not abbreviated within a heading except when used as part of the place name.

APPEARS AS:	ENTER AS:
State University of New York at Albany.	State Univ. of New York at Albany. ①
University of Rochester, Rochester, New York.	Rochester Univ., NY.

2.3.2.e

Names of state and local government agencies should start with the names of the state or local government; words like "state", "city", "county" are included or omitted in acordance with local practice.

APPEARS AS:	ENTER AS:
Community Redevelopment Agency of the City of Los Angeles.	Los Angeles City Community Redevelopment Agency, CA.
County of Los Angeles, Department of Health Services, Los Angeles, CA.	Los Angeles County Dept. of Health Services, CA.
Department of Education, State of New York, Albany, New York.	New York State Dept. of Education, Albany.

2.3.2.f

The name "University of...(city or state)" is always written beginning with the city or state name, regardless of legal and financial relationships; punctuation is not inserted in the inverted form (as is done when cataloging according to AACR2). ②

APPEARS AS:	ENTER AS:
University of Pennsylvania, Philadelphia, Pennsylvania.	Pennsylvania Univ., Philadelphia.
The University of Alabama in Huntsville.	Alabama Univ. in Huntsville. ③
University of Wisconsin-Madison, Madison, Wisconsin.	Wisconsin Univ.-Madison. ④

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① ERIC uses: "State Univ. of New York, Albany."

② ERIC drops "at," "in," and " - (hyphen)," etc. used to designate individual campuses or branches.

③ ERIC uses: "Alabama Univ., Huntsville."

④ ERIC uses: "Wisconsin Univ., Madison."

2.3.2.g

The names "University of...(geographic region)" and "State University of..." are written without reversal.

APPEARS AS:	ENTER AS:
University of the South, Sewanee, TN.	University of the South, Sewanee, TN.

APPEARS AS:	ENTER AS:
State University of New York at Stony Brook, New York.	State Univ. of New York at Stony Brook. ⑤

2.3.2.h

Departments of universities are always written in the form "Dept. of ...", regardless of the way they appear on the report.

APPEARS AS:	ENTER AS:
University of Southern California, Los Angeles. Electrical Engineering Dept.	University of Southern California, Los Angeles. Dept. of Electrical Engineering.

2.3.2.i

Major committees of executive organizations are written following the names of the organization.

APPEARS AS:	ENTER AS:
Committee on Earthquake Engineering Research. Commission on Engineering and Technical Systems. National Research Council.	National Research Council, Washington, DC. Committee on Earthquake Engineering Research.

2.3.2.j

Joint committees are written directly under their own names.

APPEARS AS:	ENTER AS:
Congress of the United States, Joint Committee on Reduction of Federal Expenditures.	Joint Committee on Reduction of Federal Expenditures (U.S. Congress).

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⑤ ERIC uses: "State Univ. of New York, Stony Brook."

2.3.2.k

Abbreviations are not used as the first word of a heading, but are spelled out.

APPEARS AS:	ENTER AS:
AF Avionics Laboratory, Wright-Patterson Air Force Base, Ohio.	Air Force Avionics Lab., Wright-Patterson AFB, OH.

APPEARS AS:	ENTER AS:
St. Anthony Hospital, Columbus, Ohio.	Saint Anthony Hospital, Columbus, OH.
U.S. Steel Corporation, Monroeville, Pennsylvania.	United States Steel Corp., Monroeville, PA.

2.3.2.1

An exception is made only when the abbreviation is a legally or officially established element of the corporate title.

APPEARS AS:	ENTER AS:
RCA Corp., New York, N.Y. (legal name)	RCA Corp., New York.

2.3.2.m

If an organization customarily uses an abbreviated form of its official, legal, or chartered name, the abbreviated form is preferred.

APPEARS AS:	ENTER AS:
Alabama Agricultural and Mechanical University, Normal, AL.	Alabama A and M Univ., Normal.
Leland Stanford Junior University, Stanford, Calif.	Stanford Univ., CA.

2.3.2.n

If an organization changes its name, both old and new forms of the name are retained, with cross references made between them. (See Appendix 5). A specific report is cataloged under whichever name appears on the publication.

2.3.2.o

If a report is authored jointly by two or more components of the same organization, the heading should be no more specific than the smallest organizational level common to all components. ⑥

APPEARS AS:	ENTER AS:
General Electric Co., Cincinnati, Ohio. Flight Propulsion Division. Advanced Engine Technology Department and General Electric Co., Cincinnati, Ohio. Flight Propulsion Division. Large Jet Engine Department.	General Electric Co., Cincinatti, OH. Flight Propulsion Div.

2.3.2.p

When two companies are participating in a joint venture, the names are combined into a single source. The combination is usually found on the document. ⑦

APPEARS AS:	ENTER AS:
DeLeuw, Cather and Co. and STV, Inc. Washington, DC.	DeLeuw, Cather/STV, Washington, DC.

2.3.2.q

International unions or organizations which have no permanent headquarters may be written with no place name. ⑧

APPEARS AS:	ENTER AS:
International Association for Quaternary Research.	International Association for Quaternary Research.

---

⑥ When several subdivisions of large government (state or federal) agencies or universities are jointly the source, ERIC does not adhere to this rule. For example, two major offices in the Department of Education, the "Office of Educational Research and Improvement" and the "Office of Elementary and Secondary Education," appearing as joint sources, would *not*, in most circumstances, be cataloged under the broader "Department of Education" but would each be cataloged separately.

⑦ ERIC normally does not combine organizations into one name; however, if an entity, e.g., a project name, incorporates two organizations, then the source is entered in that format, e.g., "Annenberg/CPB Project."

⑧ ERIC extends this rule to include any entity without a fixed address, e.g., consortia, networks, state or local associations, professional associations, etc.

2.3.2.r

If any of the following terms is written out on the document, it should be abbreviated within the corporate heading. (Authority: U.S. Government Printing Office Style Manual and foreign dictionaries)

Abteilung	Abt.
Air Force Base	AFB
Air Force Station	AFS
Aktiebolaget	A.B.
Aktiengesellschaft	A.G.
Aktieselskab	A/S
Anciens	Anc.
bij voorbeeld	B.V.
Boluk	Bl.
Brothers	Bros.
College	Coll.
Campagnie	Cie.
Campania	Cia.
Company	Co.
Corporation	Corp.
Departement	Dept.
Department	Dept.
Departmental	Dept.
Departmentet	Dept.
Dipartimento	Dipt.
Divisao	Div.
Division	Div.
Divisione	Div.
eingetragner Verein	e.V.
Etablissements	Ets.
Geobroeders, Gebrueder	Gebr.
Gesellschaft mit beschraenkter Haftung	G.m.b.H.
Incorporated	Inc.
Ingenieur	Ing.
Institut	Inst.
Institute	Inst.
Institute of Technology	Inst. of Tech.
Institutet	Inst.
Instituto	Inst.
Institutt	Inst.
Institutul	Inst.
Instituut	Inst.
Instytut	Inst.
Istituto	Ist.
Kommanditgesellschaft	K.G.
Kommanditselskab	K/S
Laboratoire	Lab.
Laboratoires	Labs.
Laboratories	Labs.
Laboratoriet	Lab.
Laboratorio	Lab.
Laboratorium	Lab.
Laboratory	Lab.
Limited	Ltd.

Maatschappij	Mij.
Manufacturer	Mfr.
Manufacturers	Mfrs.
Manufacturing	Mfg.
Naamloze Vennootschap	N.V.
Offene Handlesgesellschaft	O.H.G.
Professional Corp.	P.C.
Private or (P)	Pvt.
Proprietary	Pty.
Public Limited Co.	PLC
Societa per Azioni	S.p.A.
Societe Anonyme	S.A
Societe a Responsabilite Limitee	S.R.L.
spolka	s-ka
Universidad	Univ.
Universidade	Univ.
Universita	Univ.
Universitaet	Univ.
Universitas	Univ.
Universitatea	Univ.
Universite	Univ.
Universiteit	Univ.
Universitet	Univ.
Universitetet	Univ.
Universiti	Univ.
University	Univ.
Univerzita	Univ.
Univerzitet	Univ.
Uniwersytet	Univ.
Volkseigner Betribe	VEB.

NOTE: This rule does not restrict the use of abbreviations that occur on the document.

2.3.2.s

The following abbreviations are used for U S geographic names when used as part of the geographic location; the abbreviations are taken from the National ZIP Code Directory.

Alabama - AL
Alaska - AK
American Samoa - AS
Arizona - AZ
Arkansas - AR
California - CA
Canal Zone - CZ
Colorado - CO
Connecticut - CT
Delaware - DE
District of Columbia - DC
Florida - FL
Georgia - GA
Guam - GU
Hawaii - HI
Idaho - ID
Illinois - IL
Indiana - IN
Iowa -IA
Kansas - KS
Kentucky - K
Louisiana - LA
Maine - ME
Maryland - MD
Massachusetts - MA
Michigan - MI
Minnesota - MN
Mississippi - MS

Missouri - MO
Montana - MT
Nebraska - NE
Nevada - NV
New Hampshire - NH
New Jersey - NJ
New Mexico - NM
New York - NY
North Carolina - NC
North Dakota - ND
Ohio - OH
Oklahoma - OK
Oregon - OR
Pennsylvania - PA
Puerto Rico - PR
Rhode Island - RI
South Carolina - SC
South Dakota - SD
Tennessee - TN
Texas - TX
Trust Territories - TT
Utah - UT
Vermont - VT
Virgin Islands - VI
Virginia - VA
Washington - WA
West Virginia - WV
Wisconsin - WI
Wyoming - WY

2.3.2.t

The Directory is also used to establish the correct form of the place name in cases of doubt. If a branch post office has a ZIP code different from that of the main post office, the name of the branch post office is used.

APPEARS AS:	ENTER AS:
Argonne National Lab., Lemont, IL.	Argonne National Lab., IL. (since Argonne is a substation of Lemont but has its own ZIP code)

2.3.2.u

For military installations, the post office as given in the Directory is used.

APPEARS AS:	ENTER AS:
Wright-Patterson Air Force Base, Ohio.	Wright-Patterson AFB, OH.
Andrews Air Force Base, Maryland.	Andrews AFB, Washington, DC.

2.3.2.v

For Fleet and Army Post Offices, military forms are used; include the abbreviation "APO" or "FPO" and the ZIP code, but omit the state name.

APPEARS AS:	ENTER AS:
Army Research Institute Field Unit, APO New York 09403.	Army Research Inst. Field Unit, APO New York 09403.
Naval Medical Research Unit No. 3, FPO New York 09527.	Naval Medical Research Unit No. 3, FPO New York 09527.

2.3.3 Selection of Elements of Organization Name Headings: Exceptions

2.3.3.a

Proper names - A smaller organization element that begins with a proper name is selected as the secondary or subelement, ignoring other smaller elements in the imprint. Proper names include a noun not defined in the dictionary, the name of a person, part of the name of a company repeated in the name of the component, an acronymic form of name, and geographic names.

APPEARS AS:	ENTER AS:
Johns Hopkins Univ., Baltimore, MD. Dept. of Physics, Carlyle Barton Lab.	Johns Hopkins Univ., Baltimore, MD. Carlyle Barton Lab.
General Motors Technical Center, Warren, MI. GM Transportation Systems Center.	General Motors Technical Center, Warren, MI. GM Transportation Systems Center.
Department of Energy, Pittsburgh, PA. Pittsburgh Mining Technology Center. Division of Fossil Fuel Extraction.	Department of Energy, Pittsburgh, PA. Pittsburgh Mining Technology Center.

2.3.3.a(1)

If there are two subordinate elements, one showing a proper name and one showing a report series, the subelement element represented by the report series is chosen.

APPEARS AS:	ENTER AS:
Report Number LBL-801 and California Univ., Berkeley, Dept. of Physics. and California Univ., Berkeley. Lawrence Berkeley Lab.	California Univ., Berkeley. Lawrence Berkeley Lab.

2.3.3.a(2)

If the first element of a heading begins with initials of a personal name, the entry is started with the surname, followed by initials enclosed in parentheses.

APPEARS AS:	ENTER AS:
E.I. Du Pont de Nemours and Co., Wilmington, DE.	Du Pont de Nemours (E.I) and Co., Wilmington, DE.
B.F. Goodrich Co., Akron, OH.	Goodrich (B.F.) Co., Akron, OH.

2.3.3.a(3)

If the first element of a heading begins with a personal forename, and it is the name of a company or other commercial/industrial organization (including Associates, Engineers, etc.), the heading starts with the surname, followed by forename and initials enclosed in parentheses.

APPEARS AS:	ENTER AS:
Arthur D. Little, Inc., Cambridge, MA.	Little (Arthur D.), Inc., Cambridge, MA.

2.3.3.a(4)

If the first element of a heading begins with a personal forename, and is the name of a university, laboratory, institute, center, hospital, foundation or other apparently non-commercial organization, the heading is written directly as given.

APPEARS AS:	ENTER AS:
M.D. Anderson Hospital and Tumor Institute, Houston, TX.	M.D. Anderson Hospital and Tumor Inst., Houston, TX.
Harry Diamond Laboratories, Washington, DC.	Harry Diamond Labs., Washington, DC.

2.3.3.a(5)

If the subordinate element of a heading begins with a personal name, that name is written without rearrangement.

APPEARS AS:	ENTER AS:
California Institute of Technology, Pasadena, CA. W. M. Keck Laboratory of Engineering Materials.	California Inst. of Tech., Pasadena. W.M. Keck Lab. of Engineering Materials.

2.3.3.a(6)

A subordinate element that begins with the words U.S., National, or the state name in a state organization, is entered as an independent organization.

APPEARS AS:	ENTER AS:
U.S. Army Engineer District, Huntington. Corps of Engineers, Huntington, WV.	Army Engineer District, Huntington, WV.

APPEARS AS:	ENTER AS:
Hawaii Institute of Geophysics, University of Hawaii, Honolulu, Hawaii.	Hawaii Inst. of Geophysics, Honolulu.
National Magnet Laboratory, Massachusetts Institute of Technology, Cambridge, MA.	National Magnet Lab., Cambridge, MA.

2.3.3.b

Independent names - A subordinate element of a company is recognizable as an independent corporate entity by words such as Inc., Co., Ltd., Corp., etc., or by the fact that descriptive phrases such as "a division of ...", "a subsidiary of ...", are not included within the name itself. Such an independent element is written as a single-element heading with place name, omitting the name of the largest element. The heading is followed by the name of a still smaller organization element where such is included in the imprint.

APPEARS AS:	ENTER AS:
Babcock and Wilcox, A McDermott Company, New Orleans, LA.	Babcock and Wilcox, New Orleans, LA.

2.3.3.b(1)

Major bureaus and services of the U.S. Government are listed as one-element headings, omitting the larger organizational element.

APPEARS AS:	ENTER AS:
Department of Health and Human Services, Public Health Service, Rockville, MD.	Public Health Service, Rockville, MD.

Any such heading may be followed by the name of the smallest element.

APPEARS AS:	ENTER AS:
Department of Agriculture, Agricultural Research Service, Beltsville, MD. Plant Stress Laboratory.	Agricultural Research Service, Beltsville, MD. Plant Stress Lab.

2.3.3.b(2)

Parenthetical identification is added when necessary.

APPEARS AS:	ENTER AS:
Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation, Washington, DC.	Office of Assistant Secretary for Planning and Evaluation (HHS), Washington, DC.
Department of the Navy, Bureau of Medicine and Surgery, Washington, DC.	Bureau of Medicine and Surgery (Navy), Washington, DC.
Department of the Army, Adjutant General's Office, Washington, DC.	Adjutant General's Office (Army), Washington, DC.
Department of the Army, 7th Infantry Fort Ord, CA.	Infantry Div. (7th), Fort Ord, CA.

2.3.3.b(3)

Named observatories are written as independent headings.

APPEARS AS:	ENTER AS:
Chicago University, Williams Bay, WI. Yerkes Observatory.	Yerkes Observatory, Williams Bay, WI.

2.3.3.b(4)

If a college or school of a university has a proper name, it is written as an independent heading.

APPEARS AS:	ENTER AS:
Cambridge University, Cambridge, England. Trinity College.	Trinity Coll., Cambridge (England).
Virginia University, Fredericksburg, VA. Mary Washington College.	Mary Washington Coll., Fredericksburg, VA.
Pennsylvania University, Philadelphia, PA. The Wharton School.	Wharton School, Philadelphia, PA.

2.3.3.b(5)

If an independent element of a government agency is a laboratory, center, or institute, no further subdivision is used.

APPEARS AS:	ENTER AS:
Armed Forces Institute of Pathology, Washington, DC. Geographic Pathology Div.	Armed Forces Inst. of Pathology, Washington, DC.

unless the subordinate element is also represented by a report series.

APPEARS AS:	ENTER AS:
NAPTC-ATD-216 (report series) and Naval Air Propulsion Test Center, Trenton, NJ. Aeronautical Turbine Dept.	Naval Air Propulsion Test Center, Trenton, NJ. Aeronautical Turbine Dept.

2.3.3.b(6)

If a report series acronym indicates the editorial responsibility of a subordinate element of a government agency, that element is considered to be independent and no further elements are included.

APPEARS AS:	ENTER AS:
ASD/TR-83/5014 (report series) and Flight Accessories Laboratories, Aeronautical Systems Division, Air Force Systems Command, United States Air Force, Wright-Patterson Air Force Base, Ohio.	Aeronautical Systems Div., Wright-Patterson AFB, OH.

Include the subordinate element if it is also represented by a report series.

APPEARS AS:	ENTER AS:
TR-66-2-CM (report series) and C&OM-15 (report series) and Army Natick Laboratories, Natick, MA. Clothing and Organic Materials Division.	Army Natick Labs., MA. Clothing and Organic Materials Div.

NOTE: For report series in non-government agency reports, see 2.3.3.c, below.

2.3.3.c

Report series - Many reports include a report series number which indicates the level of organizational and editorial responsibility. Most of these report series include an acronym which can be readily related to one or more of the organizational elements listed in the imprint. For smaller organizational elements, that element indicated by the report series is chosen.

APPEARS AS:	ENTER AS:
ESG-84-01 (report series) and Rockwell International, Canoga Park, California. Environmental and Energy Systems Division. Energy Systems Group.	Rockwell International, Canoga Park, CA. Energy Systems Group.

NOTE: For report series in government agency reports, see 2.3.3.b(5) and (6) above.

If the report series indicates a larger-smaller order of responsibility, that order is followed in the corporate author heading, selecting the two elements indicated by the report series and ignoring any other elements.

APPEARS AS:	ENTER AS:
NIOSH/IHS-81-15 (report series) and Industrial Hygiene Section. Industry-Wide Studies Branch. Division of Surveillance, Hazard Evaluations and Field Studies. National Institute of Occupational Safety and Health, Cincinnati, Ohio.	National Inst. of Occupational Safety and Health, Cincinnati, OH. Industrial Hygiene Section.

2.3.4 Selection of Elements of Organization Name Headings: Foreign Organization Name Headings

2.3.4.a

The name of a foreign corporate body is entered as name of the organization, followed by the name of the city, followed by the name of the country written in parentheses. (See Appendix 2 for a list of geographic names to be used.) ⑨

APPEARS AS:	ENTER AS:
Royal Aircraft Establishment, Farnborough, England.	Royal Aircraft Establishment, Farnborough (England).

2.3.4.b

Foreign names are written in the native language, or transliterated from the native language whenever the native form of the name is known.

---

⑨ Appendix 2 of PB86-112349 is not printed in the EPM. ERIC treats the Canadian provinces/territories and the subdivisions of the United Kingdom and Australia as "countries."

APPEARS AS:	ENTER AS:
Societa Richerche Impianti Nucleari, Milano.	Societa Richerche Impianti Nucleari, Milan (Italy).

But if the foreign institution chooses to publish all its reports in English under an English form of organization name, or if the official publications of an institution include the organization name given in English, the English form is used.

APPEARS AS:	ENTER AS:
Technical University of Denmark, Lyngby.	Technical Univ. of Denmark, Lyngby.
Forsvarets Forskningsinstitutt, Kjeller, Norway and Norwegian Defence Research Establishment, Kjeller.	Norwegian Defence Research Establishment, Kjeller.

2.3.4.c

Names of foreign cities are not abbreviated; names of foreign countries are not abbreviated except for the following countries: (See Appendix 2.) ⑩

Germany, F.R.
German D.R.
Korea, D.P.R.
USSR.

The name of the country is not repeated if included in the heading.

APPEARS AS:	ENTER AS:
Australian National University, Canberra, Australia.	Australian National Univ., Canberra.
Centro Brasileiro de Pesquisas Fisicas, Rio de Janeiro, Brazil.	Centro Brasileiro de Pesquisas Fisicas, Rio de Janeiro.

2.3.4.d

Foreign place names are written in the form of common usage as indicated by the Board on Geographic Names-Defense Mapping Agency.

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⑩ ERIC follows its own *Geographic Authority List* for country names, e.g., "South Korea." Abbreviations normally are not used (except for USSR, now defunct).

APPEARS AS:	ENTER AS:
Universita di Milano, Italia.	Milan Univ. (Italy).

When the name forms an integral part of the heading, retain the native form.

APPEARS AS:	ENTER AS:
Politecnico di Milano, Italia.	Politecnico di Milano (Italy).

2.3.4.e

If the name of the university begins with the foreign equivalent of "University of ... (place name)," the place name is written first and the foreign form of "university" is abbreviated to "Univ."

APPEARS AS:	ENTER AS:
Universidad de Barcelona, Spain.	Barcelona Univ. (Spain).
Universidade do Brasil, Rio de Janeiro.	Brazil Univ., Rio de Janeiro.
Universita degli Studi, Parma, Italy.	Parma Univ. (Italy).
Universitaet Wien, Austria.	Vienna Univ. (Austria).

2.3.4.f

If a foreign university commonly prefers the "University of (place name)" to the official version of its name, the place name version should be used.

APPEARS AS:	ENTER AS:
Universitaet Kiel, Germany, F.R. and Christian-Albrechts Universitaet Kiel, Germany, F.R.	Kiel Univ. (Germany, F.R.).

2.3.4.g

Technische Universitaet is written using the common form of place name and omitting the formal portion of the name.

APPEARS AS:	ENTER AS:
Technishche Universitaet Carolo Wilhelmina zu Braunschweig, Germany, F.R.	Technische Univ., Brunswick (Germany, F.R.).

2.3.4.h

All other forms of name are retained as written.

APPEARS AS:	ENTER AS:
Pontificia Universidade Catolica do Rio de Janeiro, Brazil.	Pontificia Univ. Catolica do Rio de Janeiro (Brazil).

2.3.4.i

Foreign scientific academies are written as the name of the academy, followed by place and country. (Name of country is omitted when included in the name of the academy).

APPEARS AS:	ENTER AS:
Akademiya Nauk SSSR, Moscow, USSR.	Akademiya Nauk SSSR, Moscow.

2.3.4.j

Institutes, sections, etc. of foreign academies are written following the name of the academy, place and country. If an institute name from a Russian or satellite country is followed by a personal name, omit the personal name.

APPEARS AS:	ENTER AS:
Akademiya Nauk SSSR, Leningrad, USSR. Fiziko-Tekhnicheskii Institut im. A.F. Ioffe.	Akademiya Nauk SSSR, Leningrad. Fiziko-Tekhnicheskii Inst.

2.3.4.k

All other foreign institutes, not connected with their national academies, are written directly.

APPEARS AS:	ENTER AS:
Institute Hygieny a Epidemiologie, Prague, Czechoslovakia.	Institut Hygieny a Epidemiologie, Prague (Czechoslovakia).

2.4 USE: Mandatory

2.5 EXTERNAL TAG: C05

2.6 CHARACTER SET: Standard ASCII Characters

2.7 DATA SOURCE: Organizations are taken from the document, following conventions listed above. An authority file is used for standardization.

2.8 NOTES: Narrative entries follow standard formats and transliteration schemes, particularly FIPS PUB 10-3: Countries, Dependencies, Areas of Special Sovereignty, and their Principal Administrative Divisions, (1984)*; ANSI Z39.24-1976, System for Romanization of Slavic Cyrillic Characters**; and the National ZIP Code Directory.

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*Copies of FIPS PUBs referenced in these Guidelines are available from NTIS, 5285 Port Royal Road, Springfield, VA 22161.

**Copies of ANSI standards referenced in these Guidelines are available from American National Standards Institute, 1430 Broadway, New York, NY 10018.

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Section VI: Abstracting/Annotating

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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Summary of Significant Rules

1. An abstract must be written (or extracted) for *all* documents announced in RIE. An annotation must be written for all articles announced in CIJE that do not have expository titles, and is highly recommended for all other articles.

2. All abstracts and annotations must be in the English language.

3. Abstracts should be of the *informative* type whenever possible. Certain documents, because of their organization (e.g., conference proceedings, textbooks, etc.) or topic (e.g., compilations of laws, bibliographies, etc.), are not amenable to this approach and require *indicative* abstracts. Annotations, because of their restricted length, are usually indicative. Mixed informative/indicative abstracts may also be appropriate, but care must be taken to make it clear at all times whether the viewpoint being expressed is that of the author or the abstractor.

4. Abstracts should be restricted in length to one paragraph of approximately 200 words. "Table of Contents" type abstracts may go to approximately 300 words. Annotations should be restricted in length to approximately 50 words.

5. The conventional and accepted rules for good writing and good abstracting practice and style should be followed, e.g.,

   a. Brevity and clarity are essential.

   b. Abstracts (but not annotations) should have the same relative emphases as the document.

   c. Abbreviations should not be used.

   d. Acronyms should be accompanied by the spelled-out version, at least the first time they are used..

   e. Repetition of the title, or other information already contained in the descriptive cataloging, should generally be avoided.

   f. The abstractor should remain objective and avoid introducing personal prejudices.

   g. Evaluative language, comparisons of companies or commercial products, and derogatory comments concerning any person or organization should not be included, unless they are clearly identified as the author's.

   h. The distinction between author statements and abstractor statements should always be clear.

   i. Abstracts should be written in complete sentences. Annotations may employ telegraphic sentences.

6. Author abstracts should be used if they are judged adequate to convey the content of the item. Author abstracts will not and need not comply with exactly the same standards that an ERIC abstractor, writing a completely new abstract, should follow.

7. Abstracts are identified as to their authorship by putting in parentheses at the end either the word "(Author)", the initials of the ERIC abstractor, e.g., "(JS)", or, for a modified abstract, a combination of the two, e.g., "(Author/JS)".

VI. ABSTRACTING/ANNOTATING

This Section contains the rules and guidelines governing the preparation of the narrative text that is entered in the "Abstract" data field (ABST_) of the ERIC database.

The content of this field varies markedly in ERIC between document records and journal article records. Document records (for *Resources in Education* (RIE)) contain a 200-word full abstract. Journal article records (for *Current Index to Journals in Education* (CIJE)) contain a brief 50-word annotation. Both abstracts and annotations are discussed in this Section.

Individuals learning the abstracting process are encouraged to use both this Section and the separately published *ERIC Abstractor/Indexer Workbook*. This workbook was created by experienced ERIC abstractors specifically as a training manual and contains many more actual abstract examples than can be included here.

NOTE: When the word "Abstract" or "Annotation" is used in this Section, it is understood to refer to an "ERIC" abstract or annotation (i.e., the word "ERIC" has not been endlessly repeated, but must be assumed). The rules and guidelines promulgated here, while based on general standards for abstracts/annotations, have, nevertheless, been tailored to ERIC's specific needs.

A. Definition and Function of an Abstract

An abstract is an abbreviated representation of a document, without added interpretation or criticism. An abstractor must take a larger work, find its essence, and represent it concisely and accurately, without injecting the abstractor's personal biases. The minimum requirement of every abstract is a statement of the subject and scope of the document, giving sufficient information to enable users to decide if the original document is suited to their needs.

Dictionaries tend to equate an abstract with a summary, synopsis, digest, condensation, or précis. One authority defines it as a *"...terse presentation in (as far as possible) the author's own language, of all the points made, in the same order as in the original piece of primary documentary information."*

1. Informative Abstract

An *informative* abstract is a condensed version of the essential ideas of a document. It contains a statement, from the viewpoint of the author, of the thesis, development or proof, and conclusions. In short, it states what the document actually says, and attempts, insofar as possible, to be a substitute or stand-in for the original. The abstractor should not editorialize, include personal opinions, or otherwise intrude, either explicitly or implicitly. The major and minor points presented by the author should be presented in the abstract with the same emphases as in the document, so that the author's thoughts may be accurately represented. In order to accomplish this, the abstractor must read as much of the document as is necessary to understand its subject content and purpose. Illustrative examples are provided below.

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The following abstract is of a program/project report. It was written as an informative abstract in order to give the reader the maximum amount of information about the program. This is a readable, useful statement providing the essence of the report.

ABST_The 1991 Summer Youth Employment Program, sponsored by the Davis-Monthan Air Force Base in Arizona, included 596 youngsters, of whom 377 belonged to the Neighborhood Youth Corps, 130 were economically disadvantaged, and 48 were American Indian students employed by the base. A wide range of government, industrial, and educational institutions supported this vocational development program by providing funds, practicum counselors, vocational counselors, school buses, and other services. The work experience proved highly successful, due to the encouragement of the work-coordinators and counselors and the use of such techniques as resource speakers, peer tutoring, a refresher course in typing, and drug education instruction. Special education students were included in this program, which was evaluated by means of questionnaires for supervisors. (AA)

FIGURE VI-1: Informative Abstract of a Program/Project Report

The following abstract of a paper is faithful to the author's point of view. To write *"The author says..."* at the beginning of the abstract would add nothing to it (except to make a reader think that any abstract without those words in it was not quite faithful to the author) and to insert those three words in the middle of the abstract would surely confuse a reader.

ABST_Negative preconceptions about the disadvantaged often hinder the effectiveness of teachers and administrators in schools in economically depressed areas. Most disadvantaged children are not special discipline problems, nor are they hostile or unresponsive. They and their parents have high, even unrealistic, educational aspirations. Teachers should encourage in the children the self-discipline that leads to academic success, which, in turn, would break the self-fulfilling prophecies of failure. (AA)

FIGURE VI-2: Informative Abstract Written from the Author's Viewpoint

The following abstract is an example of a coherent, unified paragraph showing clearly the order of the argument in the original. Transitional words help the reader to follow the line of development.

> ABST_The teacher and the school system serve as the key mediators in the acculturation of students from different cultures. However, the teacher's commitment to the ethic of work and competition, to a future-oriented value system, and to the concept of a father-dominated nuclear family structure often tends to alienate teacher from student. As a result, many minority children, whose culture is different from that of the teacher, may never acquire the tools for full acculturation. Alienation between student and teacher may be further reinforced by the child's concept of the teacher as a success in a hostile culture and by the teacher's materialistic motivation for choosing a profession. Moreover, the educator's opportunity for a personal, individual evaluation of students is often limited by administrative prescriptions. Several important steps in teacher education can assure a more successful cultural bridge between student and school personnel. The staff should understand and accept the presence of cultural diversity in their school and initiate measures for parent cooperation and student participation in programs for developing skills and raising the aspiration level. Teachers should also exhibit flexibility in recognizing and rewarding evidences of nonverbal achievement. (AA)

FIGURE VI-3: **Informative Abstract Maintaining the Order of the Argument of the Original Document**

2. Indicative Abstract

An *indicative* abstract is a description of or guide to the content and format of the document, written from the viewpoint of an informed but impartial and objective reader. The indicative abstract reports broadly what is discussed or included in the document, in what manner the information is presented, and, if necessary, to whom the document is addressed. An indicative abstract indicates to the reader what kinds of information can be found in the document, but does not include this information. The reader is directed to the document itself for substantive details. The abstractor may obtain sufficient information to write an indicative abstract by examining the Table of Contents, Foreword, Introduction, Summary, etc., or by scanning the text without reading it in depth. Illustrative examples are provided below.

The following abstract of a bibliography gives the reader all the information likely to be needed about the content of the document. Such words as *"emphasis on"* and *"the major portion"* suggest the document's proportions and therefore its potential usefulness.

ABST_Eight hundred and nine books and articles published between 1885 and 1992 are listed in this bibliography for students of applied German linguistics at the graduate and undergraduate levels and teachers of German in high schools and colleges. Though the emphasis is on applied linguistics, some publications on linguistic theory are included. The major portion of the bibliography is devoted to works on morphology and syntax, with additional sections on general language and linguistics, phonetics and phonemics, prosodic features, linguistics and the teaching of foreign languages, and language changes in German since 1945 (especially the increased use of English words). The entries are cross-referenced and some are annotated for clarification of content. An author index and a list of the abbreviations used for titles of scholarly journals are also provided. (AA)

FIGURE VI-4: Indicative Abstract of a Bibliography

The following abstract of a report on a summer institute illustrates how an indicative abstract may be used to reflect the same *emphasis* as the original. Although there are enumerations and lists, repetitive introductory sentences have been avoided, every sentence does not end with *"...is included,"* and there is no monotony of sentence structure.

ABST_The narrative portion of this report describes a specially designed summer institute for state foreign language supervisors held at Indiana University. It summarizes activities undertaken in the six principal areas of the curriculum: (1) statistics;
(2) experimental design and research; (3) linguistics;
(4) supervision and curriculum development;
(5) psychology and professional resources; and
(6) instruction in French, German, and Spanish. The report also presents the results of the evaluation made by participants at the conclusion of the institute. The information contained in the appendixes, amounting to more than one-half of the report, includes the forms used in conducting the institute, a directory of participants and staff, the schedule of special events, the institute calendar, lecture outlines, student and faculty evaluation questionnaires, bibliographies, and a list of the materials available to participants. (AA)

FIGURE VI-5: Indicative Abstract Maintaining Relative Emphases of Original Document

The abstract below is for an article containing primarily *tables and statistical data.* It is a readable abstract, indicating what statistical data are present without actually giving detailed figures. In communicating the main trend revealed by the data, the abstract moves toward the informative.

ABST_This statistical survey presents tables showing the number of students studying French, Spanish, German, or Latin in domestic secondary schools during each school year from 1958-59 to 1991-1992, the percentage studying each language in relation to the total high school population, and the percentage studying Latin in relation to the total foreign language enrollment. The data reveal a continuous decline in the study of Latin in high schools, as compared with the study of the other three languages, and point to, among other things, a lack of understanding among students, educators, and parents of the cultural value of classical studies for the English-speaking student. The kind of nationwide "public relations" program that the Modern Language Association (MLA) launched in 1952 (to promote modern foreign language study) is recommended on behalf of classical language study. (AA)

FIGURE VI-6: **Abstract of Document Involving Numerous Statistical Tables and Their Interpretation**

3. Informative-Indicative Abstract

Ideally, an abstract should be either *informative* or *indicative*. Switching back and forth within one abstract, from a direct transmission of the author's ideas, to the style of an indicative abstract (using the point of view of the abstractor), can confuse the user. It is not always possible to achieve this ideal, however. The structure of certain documents may require a mix of the two styles. ANSI Standard Z39.14, "Writing Abstracts," states this principle as follows:

> *"A combined informative-indicative abstract must often be prepared when limitations on the length of the abstract and the style of the document make it necessary to confine informative statements to the primary elements of the document and to relegate other aspects to indicative statements."*

This same standard recommends making abstracts *"...as informative as is permitted by the type and style of the document."* If a mixed informative-indicative abstract is written, the reader must never be unsure as to whether the viewpoint of the words being read is that of the author or that of the abstractor.

The abstract that follows describes the basis for the document, and its specific recommendations, without getting excessively involved in the validity study made or technical criticism of that study. This is an appropriate mix of substantive and indicative information.

ABST_A national survey of occupational opportunities, wage rates, establishment practices, education plans, and supplementary benefits in bituminous coal mining revealed that production and related workers averaged $15.94 an hour in January 1991, up 82% since the 1983 survey. Over the same period the hourly earnings index rose by 84% for private nonagricultural workers. Reflecting primarily a series of single pay raises, each covering a large group of job classifications, the coal industry continued to have one of the lowest relative dispersion factors of worker earnings among industries studied. Of the 128,390 workers covered by the 1991 survey (virtually all men), underground-mine workers constituted three-fourths of the work force and surface workers constituted one-fourth. About 8 in every 10 workers were employed in mines having collective bargaining agreements with the United Mine Workers. Following the narrative summary are extensive data tables (making up the bulk of the document), subdivided by: (1) underground mines; and (2) surface mines. Tables under each section cover total earnings, work schedules, shift differential practices, educational benefits, paid holidays, vacations, health insurance, retirement plans, occupational earnings by size of mine, and occupational earnings by state or region. Appendixes describe the survey methodology and 40 specific mining occupations. (AA)

FIGURE VI-7: Sample of an Informative/Indicative Abstract

When it is necessary, in an otherwise informative abstract, to note the document's tables, figures, extensive references, or appendixes, the abstractor may often achieve the desired separation of styles by placing this information at the end of the abstract. (For other techniques, see the *ERIC Abstractor/Indexer Workbook.*)

In summary, the informative abstract does what the indicative cannot. It shows the meaningful, coherent relationship between the author's ideas and arguments. As a result, it distinguishes between major and minor information in a document and between this document and others on the same subject. For these reasons, and because it summarizes the content of a document rather than merely giving a generalized account, the informative approach has more utility to the user than other approaches and should be preferred. Informative abstracts should be used for the majority of documents. The indicative approach should be used only in those cases where a document cannot be properly abstracted using solely the informative style.

Although two *"pure"* types of abstracts can be distinguished, the abstractor should, in all practicality, realize that in describing a document's content in an indicative abstract, some information about substance is also being conveyed. Similarly, an informative abstract may, in the normal course, include some information of the "Table of Contents" type.

B. Selection of Abstract Type

The decision to write an informative, indicative, or mixed abstract depends upon the format or structure of the document and the author's organization of the information. The abstractor's reading time will be used to best advantage if this decision is made early. An abstractor should therefore start by examining the document to determine what kind of abstract is required. The following questions might be asked: What is the type of document in hand? What kind of abstract would be most helpful to the user? Is there too much material to be covered in an informative abstract? Will the author's abstract, if any, suffice, or must it be augmented?

1. Informative Abstract

A document with a developed thesis that can be summarized accurately usually requires an informative abstract. Many of the documents in the ERIC database are of this type, e.g.: Research Reports; Speeches/Presentations; and Dissertations.

2. Indicative Abstract

The content of some documents may be varied, broad, or designed for reference purposes. Attempts to summarize such documents may distort their content and thereby mislead the user. An indicative abstract is preferable in such cases. The following types of documents usually require indicative abstracts: Bibliographies; Conference Proceedings; and Reviews of Research.

3. Informative/Indicative Abstract

If a document has many tables, graphs, charts, attachments, appendixes, etc., along with substantive text, it may be appropriate to write a mixed abstract. The following types of documents often have such characteristics: Curriculum Guides or Teacher Guides; Administrative or Program Reports, and Textbooks.

C. Content and Emphases of an Abstract

An abstract should be *weighted* in the same proportions and with the same emphases as the document. (Weighting simply means that an abstract should reflect the author's major and minor points as they were expressed in the document. If an abstract glosses over or deletes an important point and highlights a minor point, the abstract is improperly weighted.)

Proper weighting of the abstract can be accomplished by transmitting accurately, clearly, and completely the essential information in a document. The reader should never be unsure as to the content of a document and must be able to find in the *document* the full corresponding information mentioned in the *abstract*.

Although, by its nature, abstracting is a process of selection, the abstractor must remain objective and must be faithful to the content of the document. Particular personal or professional prejudices should never be introduced, either explicitly or implicitly. Evaluations, unless they are the author's, should never be part of the abstract. An abstractor should consider the following categories of information when writing an abstract, though no one abstract is likely to include information in all categories.

1. **Subject Matter, Scope, and Purposes of Document**

   Whenever possible, this should be a summary or condensation of the actual subject matter substance of the work, rather than a mere description or listing of its contents.

2. **Publication/Document Type**

   Indicate in the abstract the general form or organization of the work, e.g., whether it is a collection of essays, literature review, humorous piece written with tongue-in-cheek, in-depth analysis, exposé, eyewitness account, commission/committee report, research report, case study, or report of a controlled experiment.

   NOTE: This information, essential for a stand-alone abstract, is also coded systematically for searching purposes into the Publication Type cataloging field.

3. **Author's Viewpoint/Bias**

   What is the author's viewpoint (e.g., anthropological, sociological, or psychological)? Is one theme or approach emphasized over all others?

4. **Intended Audience**

   Is the work oriented toward the theoretician, practitioner, student, parent, teacher, administrator, or researcher? (However, the abstractor should not assume audiences not stated by the document.) Is a specific grade level or education level indicated for curriculum material presented?

5. **Relationship to Other Works (When Stated by Work in Hand)**

   Is the work new, claimed as a breakthrough, or does it parallel other work? Do the conclusions reached or methods used contradict other prior work or are they directly inspired by prior work?

   NOTE: However, if cross-referencing only to specific related accessions, use the NOTE field.

6. **Intended Use**

   Does the work contain materials intended for specific application, e.g., a curriculum supplement, classroom exercises, etc.? (However, the abstractor should not speculate on unstated potential uses of the document.)

7. **Special Features**

   Does the work include a large bibliography, glossary, or classification scheme? Do the illustrations include color plates or maps? Is there an index? Are survey instruments or testing devices included? Is the work part of a related series?

   NOTE: Some of this information may be covered adequately by the cataloging; some may require elaboration in indicative portions of the abstract.

8. Results or Findings

Were there any formal conclusions, results, findings, or recommendations reached by the work that should be covered? If the conclusions and recommendations are too numerous to include completely, a selection should be made of the most significant or most representative.

D. Audience for the Abstract

The users of the ERIC system are most frequently professionals (teachers, researchers, and administrators) from many different areas of specialization in the field of education. There is, however, a large audience of potential users (new teachers, graduate students, librarians, information center personnel), or people who have only a related interest in the field (parents, journalists), who may not be familiar with the technical jargon of a particular subject matter area. Therefore, *each abstract should be written in a comprehensible style.*

No abstract should be so narrow in outlook, or use language so indigenous to one particular field, that it cannot be read with some understanding by most users of the ERIC system. (Author abstracts will, of course, tend more than abstracts supplied by others to reflect the language and style of the original document.) Documents written in highly technical language (not emulated by the abstract) may require some indication of this fact in the abstract. Yet the abstractor should assume that the readers share a basic core of knowledge (most readers will know much more, of course); therefore, an abstract should not dwell unnecessarily on background information or on commonplace ideas. Lastly, *an abstractor should always remember that the abstract is being written for a user who has not seen the document.*

E. Author Abstracts (When to Use Them)

1. General

When a document does not provide its own abstract, then ERIC must create an abstract for the document. Abstracts created by ERIC should be prepared according to the ERIC guidelines for abstracting.

When a document provides its own abstract (i.e., an "author abstract"), then the Clearinghouse must decide whether to use that abstract as is, whether to modify it, or whether to ignore it and write a new original abstract.

In making this decision, there are several factors to consider, all of which will be discussed below, but it is important to understand above all that *an author abstract need not be written according to ERIC guidelines.* This is not surprising. The vast majority of authors are totally unaware of the ERIC guidelines and could hardly be expected to have observed them when preparing abstracts. It would be unduly restrictive of ERIC to take the position that author abstracts have to be in the ERIC mold in order to be usable.

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2. Quality of Author Abstracts

Author abstracts have the advantage of being written by the person who undoubtedly knows best the content of the document and the message that document has for its users. Unfortunately, that is not always a guarantee that an author abstract is written well or even adequately. Author abstracts can, on occasion, be poor and cannot be used. On the other hand, they are frequently quite adequate and can be used. The Clearinghouse must review an author abstract (if one exists) and make a decision as to whether it communicates adequately the subject content of the document in question. In doing this, the Clearinghouse should not impose ERIC standards for abstracting, but rather basic standards for good writing and communication.

On occasion, an author abstract will be adequate except for one or two serious omissions (e.g., failure to summarize the study results) or one or two unfortunate inclusions (e.g., misplaced acknowledgments). In such cases, the author abstract can serve as the basis for an ERIC abstract and the Clearinghouse may decide to use a "modified author abstract." Abstracts should be modified only for good reason. Misspellings and typos should, of course, be corrected, but mere word substitutions, and other changes involving the abstractor's personal preference, should be avoided.

If an author abstract does not adequately communicate the content of a document, then it should not be used.

3. Advantages of Using an Author Abstract

In general, the decision to use or not to use an author abstract should favor using it. An author abstract, if available, should be used unless it is demonstrably of poor quality and fails to communicate. The principal advantages of using an author abstract are as follows:

- an author abstract is more economical. An ERIC abstractor does not have to spend 30 minutes or more analyzing a document and writing a 200-word abstract. The difference in time and cost is significant.
- an author abstract does not leave ERIC open to author (or user) complaints of misrepresentation. This factor can be especially useful if the document is very complex or if the document is on a controversial topic. ERIC cannot be faulted for using an author abstract.
- an author abstract gets the document through the processing cycle faster and results in faster announcement (on average).

4. Inclusion of Abstract Page

If a document includes an abstract, the abstract page should always be regarded as an integral part of the document and should be left intact and included with the document when sent to the Facility for editing and, later, EDRS for filming. This holds whether or not the Clearinghouse chooses to make use of that abstract for its resume.

5. Abstract Attribution

An abstract may be attributed to the author, e.g., "(Author)", to a combination of the author and the ERIC abstractor, e.g., "(Author/JS)", or to the ERIC abstractor alone, e.g. "(JS)". (See also **Section VI-F.3.p**).

The abstract should never be attributed to the author unless there is an actual *abstract* written by the author. *Use of the author's words, selected from different locations throughout the document, does not constitute an author abstract.* Phrases from book jackets or "blurbs," prefaces, introductions, forewords, and conclusions, should not be considered author abstracts.

Author abstracts that have been modified should carry the abstractor/editor's initials after the word "Author." However, abstracts that have been edited so much that the author would no longer recognize his/her own abstract should not be attributed to the author. Similarly, selecting several sentences from an author abstract or paraphrasing an author abstract does not justify citing the abstract as the author's. Author abstracts that also carry the abstractor's initials may have been augmented to identify the population sampled, the population size, geographical area where the study was conducted; may spell out an acronym or abbreviation; or may have information as to appendixes, references, statistical data, etc., added at the end of the abstract. The idea is that the changes or additions should be minor and such that the integrity of the author's abstract is essentially left intact and the author's abstract as originally written is still clearly visible. If an abstractor changes the author's language, re-arranges sentences, etc., the abstract is no longer the author's, and no author attribution should be made.

F. Rules and Authorities for Writing Abstracts

1. Authorities and Style Manuals

Most of the data fields in ERIC require fairly rigid conformance to standards established by the *ERIC Processing Manual* (EPM). However, in the Abstract field a more pragmatic approach is followed.

The principal authorities used are the University of Chicago *Manual of Style* and the *GPO Style Manual*, two of the most common and easily available manuals. Practices that can be supported by *either* authority are acceptable. Where meaning would be adversely affected, as with incomplete sentences, disagreement of verb and subject, dangling participles, incorrect capitalization, lost antecedents, incorrect spelling, etc., the guidance provided by these manuals is followed closely. Where frequently repeated structures are involved, such as lists, in which lack of uniformity is very visible, a standard ERIC format is observed. However, in many other situations the Abstract field does not operate under a rigid set of rules, but rather follows a flexible set of guidelines that permit considerable latitude in style as long as the resultant abstract is basically correct, succinct, and the meaning is clear.

Such an arrangement fits the ERIC processing environment where the abstractors are not all in one location; where they do not all receive a common training; where they may be on-site or off-site, faculty, students, freelancers, or subcontractors; where author abstracts may be used; and where the centralized editorial time available is not sufficient for the substantial re-writing of abstracts.

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2. General Rules

Brevity, succinctness, and clarity are essential characteristics of a well-written abstract. Brevity is achieved by writing the most compact and concise abstract possible. Do not ramble. Too many words may indicate that an abstract includes details not directly significant, instead of concentrating on the principal ideas and facts. Avoid the unnecessary, the obvious, and the empty (e.g., "Chapter 1 is an introduction..."). Information already apparent from the title should not ordinarily be repeated directly or paraphrased, though exceptions to this rule will arise.

Clarity in style is achieved by following the accepted rules for good writing. Useful sources of information about style and writing standards are listed in **Figure VI-8.** Clearinghouses should equip themselves with at least the latest editions of the Chicago *Manual of Style* (for rules about grammar, syntax, and good writing practice) and the *GPO Style Manual* (for many specifics in the areas of punctuation, spelling, capitalization, numerals, etc.). For specific advice on abstracts, ANSI standard Z39.14 on "Writing Abstracts" is recommended.

3. Specific Rules

a. Length

Abstracts ordinarily are limited to approximately 200 words. Within this limitation, there is no preferred length for an abstract, because the appropriate length is determined by the content of the document.

Exceptions to the length limitation occur in the case of "Table of Contents" indicative type abstracts (as for example one listing the papers in a conference proceedings), and abstracts for machine-readable data files. For example, in order to list all the papers in a proceedings, it may be necessary to use more than 200 words. (One possible way of shortening an abstract covering papers in a proceedings volume is to compress author names by substituting initials for first and middle names, but this should be done only as a last resort.)

Abstracts over 200 words should have a specific justification as in the cases noted above. Abstracts significantly over 300 words should be avoided. Abstracts over 400 words are not permitted.

b. Format

(1) Paragraphs

An abstract is always one paragraph long. The accepted rules about paragraph writing must be followed, especially those concerning coherence and unity. A coherent paragraph contains connected sentences, each following the other in logical order. An abstractor can avoid writing a paragraph that is nothing more than a series of sentences, each one summarizing a separate topic in the document, by deft use of transitional words and phrases.

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FIGURE VI-8: GUIDES, AUTHORITIES, AND STANDARDS COVERING ABSTRACTS AND WRITING STYLE

A paragraph should have a *topic sentence*, some central statement of the document's major thesis, from which the rest of the sentences can develop. (This is especially important in an *informative* abstract.) Generally, the topic sentence is the first sentence of the abstract, and because it occupies this strategic position, it should be as full and accurate a statement as possible of what the document is about, its purpose, and its audience. In the case of research papers, the topic sentence should describe the hypothesis, what was studied or researched and why, the methodology employed, and the study population.

(2) Sentences

Sentence length should vary as much as possible to avoid the unpleasant effect of a series of short, choppy sentences. Be terse, not telegraphic. Use complete sentences, omitting neither verbs nor conjunctions. Avoid the overlong, complex sentence in which the abstractor piles up clauses and phrases, especially qualifiers and modifiers, in an attempt to include as much as possible in one sentence. Appropriate use of numbered sequences and parenthetical qualifiers can often make a complex sentence more readable. Avoid the list that forces one verb awkwardly to do the work of several. Every sentence should have high information density and, without being cryptic, convey a maximum amount of information in a minimum number of words.

c. Language and Vocabulary

To best convey the flavor of the original document and to facilitate retrieval based on natural text, incorporate key words from the document into the abstract (especially if they are repeated often). Avoid direct quotations, however, for they usually do not carry enough information to be excerpted. However, single words or short phrases should be quoted if the author has coined a new phrase that is seminal to the study and if failure to call attention to it would be misleading. *The abstract should generally follow the wording and sequence of the document, especially when stating results or conclusions.* The language of the document should *not* be converted in the abstract to the terminology of the ERIC *Thesaurus* or IAL. New or technical terms should be defined briefly. Also polemical, controversial, or exceptionally suggestive words may be placed within quotation marks.

The abstractor should *try* to avoid beginning the abstract with phrases such as:

—"This report..." and
—"The purpose of this report (or document) is...."

However, sometimes clarity and the direct statement approach virtually force the abstractor to such constructions.

Also, the abstractor should avoid the monotonous repetition of sentences starting with:

—"It was suggested that...,"
—"It was found that...," and
—"It was reported that...."

or ending with such ineffective phrases as:

—"...are discussed" and
—"...are given."

However, passive voice constructions may be justified and even unavoidable when writing indicative abstracts. (See below under "Voice.")

d. Voice

The *active* voice emphasizes the *doer* of the action, e.g., *"The professor read the document."*

The *passive* voice emphasizes the *receiver* of the action, e.g., *"The document was read by the student."*

Use the *active* voice whenever possible in an *informative* abstract because it allows for direct expression when summarizing the content of the document and usually requires less space than the passive voice.

Use the *passive* voice in an *indicative* abstract to describe and to highlight the process of creating the document. Passive constructions, such as the following, should appear primarily in an indicative abstract: "...are included...," "...are discussed...," "...is presented...," "...are reviewed...."

e. Person

Abstracts should be written in the third person and should not contain unclear references to "I," "we," or "you." For example, a sentence such as "We have a Department of Education..." should be changed so that the meaning of "we" is explicit, not implicit, e.g., "The United States has a Department of Education...." Use of the third person plural can often conveniently avoid use of the gender-explicit pronouns "he" or "she."

f. Tense

The tense of the document can suggest the tense of the abstract. The present tense is proper for an indicative abstract, e.g., "...*are* listed...," instead of "...*were* listed...." Strive for tense consistency throughout the abstract.

g. Antecedents

Indefinite references to "it" should be avoided unless the antecedent is quite clear. Failure to make the antecedent of a relative pronoun clear is one of the most common writing errors.

h. Abbreviations and Acronyms

Abbreviations should be avoided and acronyms kept to a minimum. If a long phrase with a recognized acronym is used more than once, it may be spelled out the first time it appears in the abstract and the acronym used thereafter. At the time of initial use, the acronym should be placed in parentheses (*without periods*) following the term (e.g., Mobilization for Youth (MFY)). This is not necessary, however, if both spelled out version and acronym appear in the title, in which case the acronym may be used by itself throughout the abstract. If it is necessary, because of space limitations, to abbreviate, it is permissible to use the common "shorthand" of the field, e.g.: "SES" for Socioeconomic Status or "IQ" for Intelligence Quotient.

i. Lists

A "list" within an abstract is a series of items complex enough to benefit from or to require enumeration. When it is necessary to list such a series of items in the abstract, use an initial colon followed by numbered phrases separated by semicolons. The numbers indicating each item should be in parentheses (to distinguish them from any numbers that might appear in the text itself).

For example:

Conclusions are a common "list":

> Three conclusions were drawn from the survey:
> (1) AAAAA; (2) BBBBB; (3) CCCCC.

The "Table of Contents" abstract is a type of list: [*]

> Fourteen papers were presented at the conference: (1) "Alpha" (Betty Jones); (2) "Beta" (Tom Smith); (3) "Gamma" (David Johnson)...

Note that simple sequences may not require the "list" approach, e.g., "Respondents expressed concern about classroom management, ability grouping, and student assessment."

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[*] Full-text searching techniques permit a "Table of Contents" type abstract to provide access to the titles and authors of individual presentations even when they are not separately processed.

j. Numbers, Measurement, Time, etc.

In general, follow the rules in the *GPO Style Manual*, Section 12 on "Numerals." These rules are too extensive to summarize here, but some major points are:

- In general, numerals referring to sections, chapters, etc., should be recorded in Arabic, in accordance with GPO and "Chicago" rules. When the numbers pertaining to sections, chapters, etc., have been written out in the document, they should be converted to Arabic numbers.

- A figure is used for a single number of 10 or more, with the exception of the first word of the sentence: e.g.:

  1-9 = "The survey was sent to five schools";
  10 or more = "The survey was sent to 150 schools";
  first word = "Twenty schools received the survey."
  mixture = "There were 8 teachers, 14 students, and 25 administrators present."

- Units of measurement and time are expressed in figures, e.g., "50 tons"; and the comma is used in a number containing four or more digits, e.g: "1,756".

k. Ethnic Group Names (Capitalization)

In the case of documents concerned with the two broad racial groups, blacks (Negroes) and whites (Caucasians), abstractors should follow the practice of lower-casing these terms, i.e., "blacks and whites."

However, in the case of documents concerned with Blacks and/or Whites *and* other ethnic, national, or racial groups, such as Asian Americans, Mexican Americans, Native Americans, etc., abstractors should follow the practice of using initial capital letters for all group names appearing in the abstract, e.g., "Blacks, Asian Americans, Hispanics, Native Americans." Names of ethnic groups used in the abstract should follow usage in the document, e.g. use "Afro American" if the document uses it; do not arbitrarily change it to "African Americans."

l. Quotations and Quotation Marks

Direct quotations from the document are not considered a good way to build an entire abstract. It is usually not possible to get a good narrative flow with this approach and the text available to quote is rarely as succinct as an abstract needs to be. Nevertheless, single words or short phrases may sometimes usefully be quoted to identify newly coined text or to point up polemical, controversial, or unusually suggestive words used in the document.

The titles of books and journals, that would normally be underlined, should instead be enclosed in quotation marks. (The underline is not a valid character in ERIC text.)

Table-of-Contents type abstracts that list, for example, the papers of a conference or the chapters of a book, should enclose the titles of the paper or chapters in quotation marks.

Material within an abstract that is between quotation marks is assumed to be directly from the document in hand, so no detailed attribution statement is necessary.

m. Noting the Existence of Large Bibliographies or Reference Lists within Documents

If a document contains or has appended a large bibliography or list of references, this is a useful fact that should be passed along to the user, generally by a statement toward the end of the abstract, e.g.:

- "Contains 150 references."
- "Appendix C is an annotated bibliography containing 250 references grouped by books, articles, and non-print materials."
- "Each paper in this proceedings volume cites an extensive list of references; it contains 309 references overall."
- "A suggested reading list is provided containing 50 references to the 'best' and most up-to-date material on nuclear disarmament."

Not all references are worth noting. Most documents contain some references. It would ***not*** be helpful to note ad infinitum *"Contains 2 references," "Contains 3 references,"* etc. This would enlarge ERIC resumes needlessly with a proliferation of non-useful information. The number of references worth calling attention to is a judgment call on the part of the cataloger and depends to some extent on the specifics or breadth of the topic under consideration. The only guidance is that the quantity must be "significant." Certainly anything over 100 would probably fall in this category and anything under 10 probably would not. The range from 11 to 99 is therefore a "gray" area, open to the judgment of the cataloger/abstractor.

The exact number of references should be cited whenever possible. If the number is not stated by the document and the references are not numbered, there may be occasional cases where counting would be excessively onerous and some general order of magnitude may be given, e.g., *"Contains approximately 300 references."* However, in general, when including information about references at all, it is best to use an exact number. References should *not* be quantified in terms of number of pages.

If a *major* part of a document consists of a bibliography, Clearinghouses should, of course, assign the Publication Type for "Bibliography" (131). However, this should be done *only*, when the document is essentially a bibliography or reference list, with perhaps some explanatory text added.

Note that in all the above examples, the phrase "contain(s)(ing)...X references" occurs. Textual searches of the following type will retrieve accessions bearing this phrase, most of which will be documents with significant numbers of references.

S contain? (2W) references[2]

n. Appendixes

Many ERIC documents have appendixes containing significant information. It is often appropriate to cite a document's major appendixes at the end of the Abstract. When doing so, it is best to be explicit about number, content, and length (relative to the text of the document).

Unacceptable	"The report contains five appendixes."
Acceptable	"Three appendixes list the workshop participants, their test results, and their evaluations of the instructors." "The following appendixes comprise the last 3 of the document's 13 sections: (1) ERIC Clearinghouse Scope of Interest Guide; (2) Document Preparation (for Filming); and (3) Glossary of Terms.

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[2] S = Search; ? = "Wild Card" Characters; 2W = within two words. (The illustration is a proximity search in DIALOG's command structure.

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o. English Language

ERIC accepts non-English documents for the database. Clearinghouses selecting non-English documents are responsible for producing an English language abstract that accurately reflects the non-English text. (The *ERIC Network Directory* contains a "Language Bank" of individuals in the network who may be able to assist with translations.) Except for proper names, spelling should follow standard American English usage (e.g., *"centers"* not *"centres,"* *"labor"* not *"labour"*). Table of Contents type abstracts, listing non-English conference paper titles, ideally should provide a brief English translation in parentheses following each non-English title cited, size and other limiting factors permitting.

p. Abstractor Identification

Each abstract should carry a designation as to its preparer. This identification should be in parentheses at the end of the abstract. The initials of the abstractor should be written without periods, e.g.:

ABSTRACTOR	EXAMPLE
The abstract was written entirely by the abstractor. Use abstractor initials.	(AS)
The abstract was written entirely by the author and was used unchanged.	(Author)
The abstractor revised an author abstract. Both should be credited.	(Author/GDC)
Abstract as obtained from an external service, e.g., the National Technical Information Service.	(NTIS) or (NTIS/AS)

FIGURE VI-9: Abstractor Identification Examples

4. Abstracting Specific Kinds of Documents

Different types of documents require different types of abstracts. Even when dealing with the same general type of abstract, however, it may be necessary to vary the approach in order to accommodate different kinds of documents. The following guidelines provide specific advice for some of the more common types of documents.

a. Reports (Research and Technical)

These usually require *informative* abstracts, which should contain:

- objectives and hypotheses of the research;
- methodology, summarized succinctly, including perhaps subjects (always provide N = if available), geographic location, ethnic/racial factors, variables, controls, conditions, and tests;
- findings and conclusions (emphasized); and
- *specific* implications and/or recommendations for further research.

If limitations to the study are mentioned, they should be included. Background information should be used only if necessary to explain the objectives. A description of unusual or extensive appendixes may be included at the end of the abstract.

b. Speeches/Presentations

These reports usually require *informative* abstracts which should contain:

- background information only if necessary;
- statement of premise or thesis;
- development of ideas or arguments with proofs and major supporting facts; and
- conclusions.

c. Curriculum Guides/Teacher Guides

These usually require *indicative* abstracts, which should contain:

- subject area and grade level of the curricular material;
- specific objectives of the course;
- particularly interesting methods used; and
- supplementary activities and materials suggested.

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d. Program Descriptions/Administrative Reports

Because of the large amount of narrative detail, these usually require *indicative* abstracts, which should contain:

- objectives of the program and identification of the target population;
- types of special teachers and other personnel and total numbers of classes or students involved;
- means or suggested means used to carry out the program;
- special methods used to overcome problems; and
- up-to-date progress of the program with any anticipated changes in plans, or, if the program has been completed, a statement of the program's effectiveness.

e. Textbooks/Instructional Materials

These usually require *indicative* abstracts, which should contain:

- objectives of the text, including target student population;
- description of the general nature of the subject matter; and
- special methods used in meeting objectives, including notation of illustrations and accompanying activities.

Recounting specific textual material is not necessary, unless doing so will explain methods used in achieving objectives.

f. Bibliographies/Directories

These usually require *indicative* abstracts, which should contain:

- subjects included;
- reference to annotations, if any;
- dates of materials (earliest to latest);
- types of materials listed;
- number of entries (approximate, if necessary);
- data fields included in entries;
- potential users or target audience.

g. Multiple-Author Works (e.g., Conference Proceedings)

Depending on the number of papers included and space limitations, these usually require *indicative* abstracts, which should contain: brief statement of the subject and scope of the collection and narrative-type table of contents, indicating titles and authors. If there are too many articles to list, distinguish broad subject areas and group the articles.

(If a document contains a large number of important papers, Clearinghouse personnel may decide to assign separate accession numbers to substantive items and to write separate informative abstracts for these "analyzed" items. Each resume for papers or sections separately analyzed should, of course, include a cross-reference to the parent item.) (See **"Analytics" in Section V.)**

h. **Tests/Measurement Materials**

These usually require indicative abstracts, which should contain: purpose and objective of the test; forms and levels of the test, including length and whether verbal or non-verbal; identification of the group to be tested, including grades, ages, etc.; description of the testing, scoring, and grading methods to be observed, including time limits, whether individually or group administered, qualifications needed to administer, special equipment needed, etc.; and normative data and any information concerning reliability, validity, and test development.

Tests or measurement/evaluation instruments, accompanying a report as supporting documentation, should always be indicated by assignment of PUBTYPE 160, and may even be analyzed out as a separate accession (see Section on "Analytics.") The ERIC Clearinghouse on Tests, Measurement, and Evaluation may be consulted if there are questions relating to such material.

i. **Congressional Hearings**

Hearings should generally be abstracted using a mixed informative/indicative approach. The indicative approach will cover the persons and organizations presenting testimony. The informative approach will cover any results, conclusions, recommendations, or clear trend to the testimony or proposed Government legislative action.

j. **Machine-Readable Data Files (MRDF)**

In the case of Machine-Readable Data Files (Pubtype 102), the ERIC guidelines for writing indicative abstracts should be observed, with the exception that a data file abstract may be longer than a document abstract (i.e., with an upper limit of 300 words in lieu of the regular limit of 200 words).

Data files collect data on specific variables/questions/factors. These variables constitute the best and most useful characterization of the content of the file. Variables should be regarded as a kind of subject index term, closely related to ERIC's familiar Descriptors and Identifiers. All major variables (but not all their variations) should be described in the abstract. Variable names should generally follow the language used by the data file itself (or its documentation). If the names are not sufficiently descriptive, however, they should be improved, as appropriate.

Since the ERIC resume format is designed for bibliographic entities and not for data files, RIE does not provide for all of the specialized fields needed to do justice to data file descriptions. One solution is to "segment" the abstract by certain of the more important fields. For example, at the end of the RIE abstract some of the crucial data can be stacked, each stack preceded by a standard Header, e.g.,

FREQUENCY: Biennial. TYPE OF SURVEY: Longitudinal
POPULATION: Higher Education Institutions (3,183). RESPONSE
RATE: Higher Education Institutions (2,770=87%)
YEAR OF LATEST DATA: 1980.

The concept here is that through the capability of full text proximity searching, using the combination of the standard Header and the actual data, a computer searcher can simulate having a special field on which to search. The official "segments" are as follows:

- **TYPE OF SURVEY**

  The purpose of this segment is to index the file by survey type. The types identified to date are shown in the small authority list below. Since a given file may simultaneously belong to several categories of survey, multiple entries in this field are permissible.

  Census [i.e., total universe]
  Population Survey
  Sample Survey
  Longitudinal Survey
  Cross Sectional Survey
  Follow-up Survey

- **POPULATION (Size)**

  A file may represent data gathered from the total universe of cases (i.e., the "population") or from a sample of that universe. In either case, the total universe should be described in this field. The description should, if possible, be in the form of the name of the data source followed by, if available, their number (actual or estimated, per documentation) in parentheses, e.g. "Private Schools (27,000)"; "College Presidents (17,000)."

- **SAMPLE (Size)**

  If the file represents data based on an sample of a larger universe of cases, then the sample should be described in this field. The description should be in the form of the name of the data sources followed by, if available, their number in parentheses, e.g., "Private Schools (1,000)."

- **RESPONDENTS (Source of Data)**

This field should answer the question as to who or what has completed the survey instrument or responded to the data-gathering methodology. Types of respondents should be indicated by using their most common generic name form, e.g., School Administrators, Students, Parents, Faculty, Counselors, Graduates, Doctors, Chief Executive Officers, Mothers, College Presidents, etc.

- **RESPONSE RATE**

If the file represents data based on responses received from a sample taken from a larger universe, then the responses received (and the response rate) should be described here. The description should be in the form of the name of the respondents (data sources) followed by their number and the percent that number is of the total sample, e.g., "Private Schools (809=81%).

- **FREQUENCY (Periodicity of Data Collection)**

This field should answer the question as to how frequently these data are gathered. In order to provide searchers with a standard set of "frequency" terms on which to search, a small authority list has been developed (e.g., weekly, monthly, etc.). The complete authority list appears below. Data that have been gathered only once, and that will not necessarily ever be gathered again, should be indicated by the word "Once" in this field. Data that have (or will be) gathered multiple times, but with no particular schedule, should be indicated by the preferred usage "Periodic" (in lieu of "Irregular" or "Occasional").

Available Frequencies:

Once
Periodic
Weekly
Monthly
Quarterly
Semiannual
Annual
Biennial
Triennial
Decennial

- **YEAR OF EARLIEST DATA (of Subfiles in the Series)**

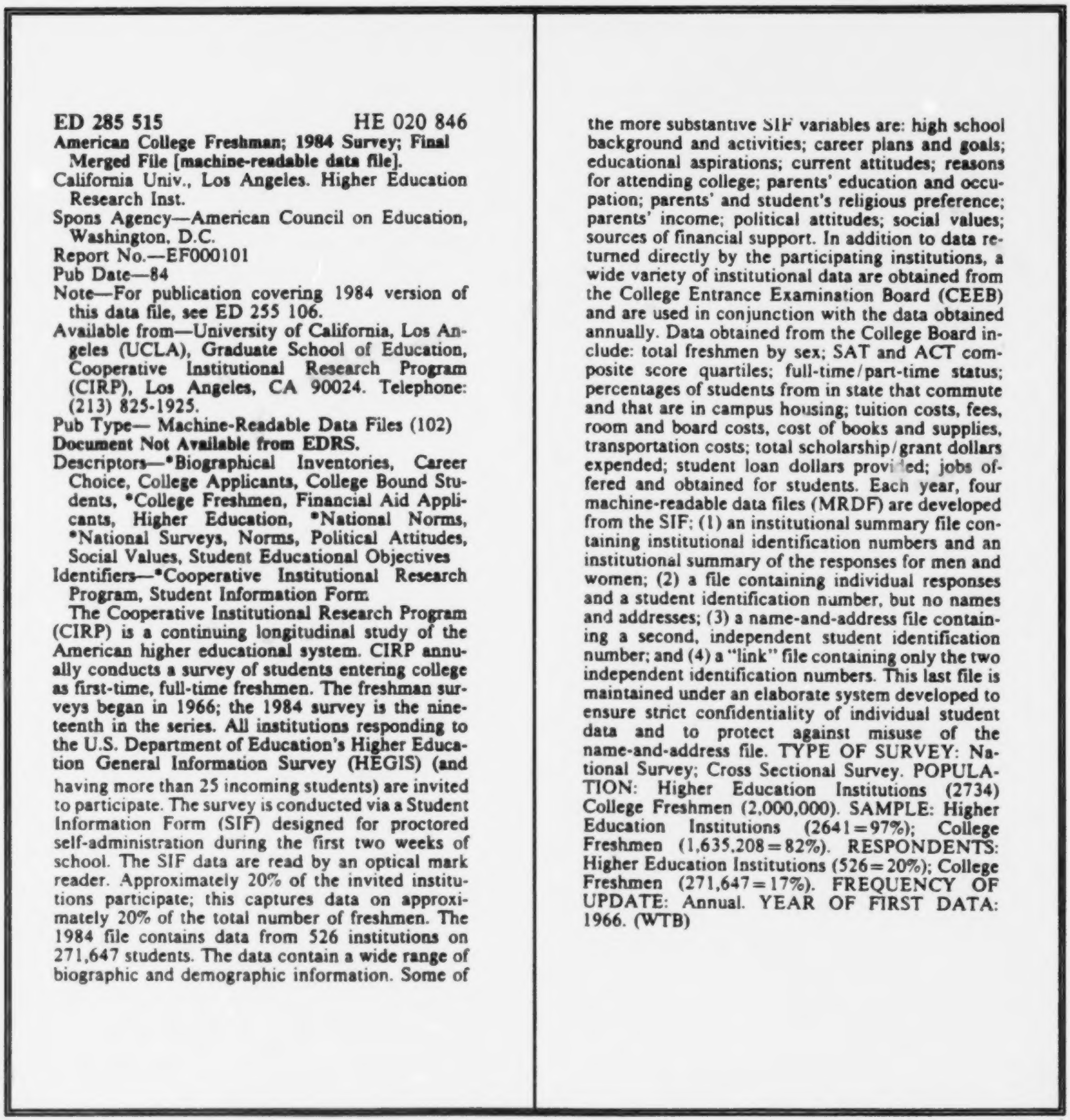
If the file being described is part of a series, then record here the year applicable to the earliest data in that series. Any entry in this field should be a single calendar year.

- **YEAR OF LATEST DATA**

If the data apply to a particular year (or span of years), then enter the year(s) here, individually, for searching purposes.

If the data do not apply to a particular year (or span of years), but were gathered in a particular year (or span of years), then enter the year(s) here, individually, for searching purposes.

A sample resume for an MRDF is shown as **Figure VI-10.**



ED 285 515 HE 020 846

American College Freshman; 1984 Survey; Final Merged File [machine-readable data file].

California Univ., Los Angeles. Higher Education Research Inst.

Spons Agency—American Council on Education, Washington, D.C.

Report No.—EF000101

Pub Date—84

Note—For publication covering 1984 version of this data file, see ED 255 106.

Available from—University of California, Los Angeles (UCLA), Graduate School of Education, Cooperative Institutional Research Program (CIRP), Los Angeles, CA 90024. Telephone: (213) 825-1925.

Pub Type— Machine-Readable Data Files (102)

Document Not Available from EDRS.

Descriptors—*Biographical Inventories, Career Choice, College Applicants, College Bound Students, *College Freshmen, Financial Aid Applicants, Higher Education, *National Norms, *National Surveys, Norms, Political Attitudes, Social Values, Student Educational Objectives

Identifiers—*Cooperative Institutional Research Program, Student Information Form

The Cooperative Institutional Research Program (CIRP) is a continuing longitudinal study of the American higher educational system. CIRP annually conducts a survey of students entering college as first-time, full-time freshmen. The freshman surveys began in 1966; the 1984 survey is the nineteenth in the series. All institutions responding to the U.S. Department of Education's Higher Education General Information Survey (HEGIS) (and having more than 25 incoming students) are invited to participate. The survey is conducted via a Student Information Form (SIF) designed for proctored self-administration during the first two weeks of school. The SIF data are read by an optical mark reader. Approximately 20% of the invited institutions participate; this captures data on approximately 20% of the total number of freshmen. The 1984 file contains data from 526 institutions on 271,647 students. The data contain a wide range of biographic and demographic information. Some of the more substantive SIF variables are: high school background and activities; career plans and goals; educational aspirations; current attitudes; reasons for attending college; parents' education and occupation; parents' and student's religious preference; parents' income; political attitudes; social values; sources of financial support. In addition to data returned directly by the participating institutions, a wide variety of institutional data are obtained from the College Entrance Examination Board (CEEB) and are used in conjunction with the data obtained annually. Data obtained from the College Board include: total freshmen by sex; SAT and ACT composite score quartiles; full-time/part-time status; percentages of students from in state that commute and that are in campus housing; tuition costs, fees, room and board costs, cost of books and supplies, transportation costs; total scholarship/grant dollars expended; student loan dollars provided; jobs offered and obtained for students. Each year, four machine-readable data files (MRDF) are developed from the SIF: (1) an institutional summary file containing institutional identification numbers and an institutional summary of the responses for men and women; (2) a file containing individual responses and a student identification number, but no names and addresses; (3) a name-and-address file containing a second, independent student identification number; and (4) a "link" file containing only the two independent identification numbers. This last file is maintained under an elaborate system developed to ensure strict confidentiality of individual student data and to protect against misuse of the name-and-address file. TYPE OF SURVEY: National Survey; Cross Sectional Survey. POPULATION: Higher Education Institutions (2734) College Freshmen (2,000,000). SAMPLE: Higher Education Institutions (2641=97%); College Freshmen (1,635,208=82%). RESPONDENTS: Higher Education Institutions (526=20%); College Freshmen (271,647=17%). FREQUENCY OF UPDATE: Annual. YEAR OF FIRST DATA: 1966. (WTB)

FIGURE VI-10: MACHINE-READABLE DATA FILE—(SAMPLE ENTRY)

5. Local Conventions for Specialized Problems

Each of the ERIC Clearinghouses confronts writing and related style problems that are specific, if not unique, to their respective scope areas. Ideally, a "local" standard or consistent way of dealing with these problems should be developed.

For example, the ERIC Clearinghouse on Languages and Linguistics has developed the following "local" practice for dealing in the abstract with the well-known phrase "English as a Second Language."

- The phrase will always be written in initial capitals, e.g., " ...students learning English as a Second Language."
- When used as an adjective, the phrase will be hyphenated, e.g., "...teachers in the English-as-a-Second-Language classroom."
- The abbreviation ESL will be placed after the first appearance of the phrase, after which the abbreviation alone can be used to represent the concept, e.g., "...students learning English as a Second Language (ESL)...The ESL student performed best on..."

G. Rules for Writing Annotations

1. Definition and Function of an Annotation

An annotation is a succinct explanation or description of a particular work. Although closely related to an abstract, an annotation is considerably briefer and therefore usually characterizes rather than summarizes.

In the ERIC system, annotations of no more than 50 words are prepared for journal articles (EJ Accession Series) announced in *Current Index to Journals in Education* (CIJE). The purpose of an annotation is to explain and indicate important facets of content not evident from the Title, Descriptors, or Identifiers, and thereby to facilitate the user's search of the periodical literature.

2. General Approach to Annotating

Annotations are recommended for CIJE citations. If the scope of an article is adequately expressed by the title, bibliographic citation, and accompanying Descriptors or Identifiers, an annotation is not mandatory. If, however, the normal entry fails to convey subject content or an important feature or aspect of the substance of an article, an annotation should be added. *If in doubt, always supply an annotation.* The true meaning and utility of an article may be lost because of a clever title (e.g., "Climb the Ladder" or "Send No Box Tops") or a highly technical title (e.g., "The Saint-Cloud Method: What It Can and Cannot Achieve" or "Tandhoff's Disease in a Scottish Family"). When this situation occurs, an annotation must be added.

Either informative or indicative annotations are permissible. However, the brevity of the annotation form presupposes that most annotations will be of the indicative type. An indicative annotation is written from the point of view of an informed and objective third person and describes the content, format, or use of an article. In contrast, an informative annotation presents an objective summary of the author's own ideas, or one or more of the conclusions presented. Because of its size limitations, an annotation of this type will generally not present in condensed form a summary of the article itself. In other words, though the same general approach of developing a concise representation of a document holds true for annotating as well as for abstracting, an annotation, unlike an abstract, does not have to be weighted in the same proportions and with the same emphasis as the original article. Lengthy informative annotations should not be used.

As with an indicative abstract, an annotation should avoid evaluative language (particularly negative evaluations) introducing personal or professional prejudices. However, useful "guiding" statements can be used, such as the following: "Written for the non-specialist"; "Designed to be helpful to the practicing English teacher"; and "Attempts a clear explanation of a complex topic."

3. Specific Rules for Writing Annotations

Unless otherwise stated below, the rules that pertain to abstracts also apply to annotations.

a. Length

Annotations should as a rule not exceed 50 words. Most annotations will generally be between 30 and 50 words in length. There is a fixed upper limit of 60 words observed by the CIJE Publisher; however, there is no fixed lower limit. Author- or editor-provided annotations to articles may be used or re-written to conform to the 50-word limitation, if necessary.

b. Format

Annotations should be only one paragraph long. Whole sentences are preferable, but telegraphic sentences (not used in RIE abstracts) are acceptable, e.g., *"Categorizes all types of at risk students."* Simple phrases or lists may also be used, e.g., *"A code of ethics for counselors."* Since annotations are not necessarily written in full sentences, some of the mechanics of style described in the various style manuals do not pertain.

c. Language and Vocabulary

Since an annotation is basically an attempt to improve on an uninformative title, the annotation should avoid repeating specific terms contained in the Title or Descriptors. In other words, use the annotation to bring in fresh information, rather than to repeat information already available in the entry. This is not a strict prohibition, as circumstances will sometimes necessitate that a term be repeated. If special or unusual words appear in the title, the annotation can be used to explain them. Unlike an abstract, an annotation may be composed of a quotation excerpted from the article (and punctuated as such).

d. Example of Annotation

Title: *Homeplace: Experiencing a National Historic Landmark*

```
ABST_Gifted high school students collaborated on a
study of the architecture and lifestyle associated
with Homeplace, an 18th century French Colonial
home in Louisiana.  The activities culminated in a
multimedia exhibit at a local art gallery. (AA)
```

FIGURE VI-11: Annotation Augmenting Non-Informative Title

H. Relationship Between Abstract and Other Data Fields

An ERIC resume attempts to be a thorough but succinct characterization of a document/article. Duplication and redundancy should generally be avoided in the textual fields: Title, Institution Name, Sponsoring Agency Name, Note, and Abstract. For example, it would be a waste of space and words to repeat needlessly the Title or Institution Name in the Abstract.

This admonition does not, however, apply to the "index" fields (Descriptors, Identifiers, Geographic Source, Language, Publication Type, etc.), where the job of the field is often to index and standardize information appearing elsewhere in the resume.

- **Title Field**

  The Title field should generally not be repeated in the Abstract. Although it is virtually impossible to avoid using some words from the Title, exact repetition should be avoided, particularly for such documents as conference proceedings, hearings, etc., where the location and dates are usually a regular part of the Title.

- **Institution/Sponsoring Agency Name**

  The name of the preparing institution and the sponsoring agency will appear in the INST_ and SPON_ fields, respectively, and should not be repeated in the Abstract.

- **Descriptive Note**

  The NOTE_ field may contain a wide variety of information, e.g., dissertation/thesis information, reproducibility information, conference information (when not part of the Title). None of this information should be repeated in the Abstract.

- **"Index" Fields (e.g., Descriptor, Identifier, Publication Type, Geographic Source)**

  Information appearing in the various "index" fields may appear in the Abstract, as needed, without restriction or fear of redundancy. The purpose of these fields is to standardize access points. Inevitably these fields will draw on the Abstract for their content.

I. Guidelines for the Editing (by the ERIC Facility) of Clearinghouse-Prepared Abstracts

As part of the review of RIE resumes, the ERIC Facility editors review all abstracts received from the Clearinghouses. Their primary responsibility is to ensure that there are no discrepancies between the content of the abstract and the document (e.g., abstract lists something that is not in the document; all names of persons, organizations, tests, etc., are accurately recorded). In addition, the editors watch for the following kinds of situations, making needed changes as indicated to ensure reasonable consistency among abstracts.

1. Overall Size

"...abstracts are limited to approximately 200 words." (EPM VI.F.3.a).

Informative abstracts that significantly exceed 200 words should be brought to the attention of the submitting Clearinghouse, but should generally *not* be re-written unless the size exceeds 300 words. The objective is to catch the problem at the point abstracts are written and to keep the occurrences to isolated instances that do not require re-write. If the problem persists, it should be pursued via managerial channels. Recurrences may, at the judgment of the editor, be negotiated with the Clearinghouse for either: return to the Clearinghouse for re-write, or reduction in size by the Facility.

Abstracts significantly *under* the 200 words size limitation are not to be considered a problem.

2. Type of Abstract (Informative vs Indicative vs Informative/Indicative)

The choice of type of abstract is the Clearinghouse's. The Facility should, in general, not question this choice.

3. Missing Information

There may be cases in which significant information, e.g., conclusions or recommendations, has been left out of the abstract. The most usual situation occurs when there are significant indicative aspects of the document that might be communicated, but the Clearinghouse has ignored these aspects, e.g., appendixes, attachments, large bibliography, multi-volumes, etc. The Facility editors may, at their discretion, add such information to the abstract, alerting the Clearinghouse when this is judged advisable.

4. Acronyms

Facility editors should ensure that all acronyms appearing in the abstract are interpreted somewhere in the abstract (preferably at their first occurrence).

5. Abbreviations (as Distinguished from Acronyms)

Facility editors should replace abbreviations with the full form of the word, except in special situations such as when the abbreviation is in quotes or the abbreviation is the standard form of the concept in the literature of the field, e.g., "SES."

6. Slang, Swear Words, etc.

Facility editors should generally replace slang and swear words with meaningful and non-offensive equivalents, except in special situations such as when the colloquial word is being treated per se and is essential to the statement being made.

7. **Derogatory, Pejorative, or Libelous Statements Concerning Individuals or Organizations**

Facility editors should question all seemingly derogatory, pejorative, or libelous statements found in abstracts. Such statements should either be deleted or the editor should receive management approval for their inclusion.

8. **Evaluative Statements and Product Comparisons**

Facility editors should question all statements making evaluations or direct comparisons of organizations or commercial products. Such statements should either be deleted or the editor should receive management approval for their inclusion.

9. **Typographical Errors/Misspelled Words**

All typographical errors and misspelled words detected by the editors should be corrected.

10. **Incomplete Sentences**

Telegraphic sentences are not acceptable in RIE abstracts and should be expanded by the Facility editors to complete sentences.

11. **Missing Words or Lines**

Occasionally words or phrases are inadvertently deleted in the keying or transmission process, resulting in ungrammatical or incongruous sentences. The editors should research the missing information and replace the missing material.

12. **Abstract Attribution**

The abstract should be attributed accurately. If the abstract appears in the document, but is attributed to the Clearinghouse abstractor, a correction to "author" abstract status should be made. If the abstract is attributed to the author, but does *not* appear in the document, a correction to the Clearinghouse abstractor's initials should be made.

13. **Repetitive/Redundant Information**

If information that appears in the Title field, Note field, or other field is repeated *unnecessarily* in the abstract, the Facility editors may, at their discretion, remove such redundant information from one or the other of the two fields, making the necessary transitions.

14. **Author/Abstractor Confusion (Who's Talking?)**

If there is significant confusion in the abstract between what is said by the author of the document and what is said by the abstractor, the Facility editor may eliminate the confusion, contacting the Clearinghouse as needed to accomplish this.

15. **Paragraph Structure**

All abstracts must be self-contained in one paragraph. Abstracts structured as more than one paragraph must be converted to the one paragraph format.

16. Lists

Lists are to follow the format specified in the EPM: "The following conclusions were drawn: (1) xxxxx; (2) xxxxx; and (3) xxxxx." Lists in the abstract not in this format should be converted to it.

17. Numbers, Measurement, Time

In general, the *GPO Style Manual* calls for Arabic numbers in preference to Roman numerals,[3] numbers rather than words for values of ten or over, units of measurement or time expressed in numbers rather than words, commas in numbers of four digits or more. Where the GPO rules have not been adhered to, the Facility may make the changes necessary to achieve consistency within a Clearinghouse-produced or modified abstract (*but not within an unmodified author abstract.*) Because such changes can be numerous, however, it is critical that the Facility contact the Clearinghouse to ensure that the problem is fixed at the source. Because rules pertaining to numbers have cosmetic value, but little or no impact on computerized retrieval, it is more important to be consistent within an abstract than it is to be consistent across the whole of RIE. (The use of author abstracts alone would prevent such consistency across the database.)

The Chicago *Manual of Style* says, "It is difficult if not impossible to be entirely consistent in the use of numbers in textual matter" (p.232). The *GPO Style Manual* and the Chicago *Manual of Style*, while they do not entirely agree on all points pertaining to numbers, are both useful because they each cover some ground not covered by the other.

18. Commonly Confused Words

Occasionally words that are commonly confused may appear in their "confused" form in ERIC abstracts. For example, the abstractor intended to say the data "imply" something and instead says the data "infer" something. When such a situation is detected, the Facility should replace the incorrect word with the correct word. The Facility will, of course, only take this type of action when absolutely certain about the validity of the change and when it is clearly supportable in the standard authorities.

19. Ungrammatical Sentences (Creating Problems With Meaning)

Lengthy sentences, with poor connectives and other grammatical faults, may make it difficult if not impossible to understand what was meant. If the Facility editors cannot, after repeated readings, understand a given sentence, they may assume that the user would have the same problem. Such a sentence should be re-structured so that its meaning is clearer. It may be necessary to contact the Clearinghouse in order to accomplish this, but such contact is not mandatory. The objective should be to make the meaning clear without the addition or deletion of any information.

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[3] Note: Roman numerals are acceptable, however, when being used to describe something that is clearly identified in the source by Roman (e.g., Title IX") rather than Arabic numerals and when conversion to Arabic might result in confusion for the user.

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20. Grammar/Usage Problems

The English language has many rules of grammar. Some are widely observed. Some are widely ignored. Those that affect the meaning of the statement being made are the easiest to justify and tend to be the most widely accepted. Those that are the most subtle, but do not affect meaning (or jar the ear), tend to be the most ignored.

The Facility editors should be on the alert primarily for those violations of the rules of grammar that affect the meaning of what is being said. An example of a rule that can affect meaning is to place the word "only" as close as possible and preceding the word it modifies, e.g., "He ate only a sandwich," *not* "He only ate a sandwich." Examples of rules that do not affect meaning are:

- the dying distinction between "shall" and " will";
- the subtle distinction between "because of" and "due to"; and
- the split infinitive (often awkward, but sometimes justified).

Grammar or usage problems detected that adversely affect the meaning of what is being said in an abstract should be corrected by the Facility editors. Usages that are widely regarded by the authorities as unacceptable should also be corrected. However, usages that do not affect meaning, that do not jar the ear, and that have some reasonable constituency (e.g., *American Heritage Dictionary* Usage Panel vote of 15% acceptability or above), should simply be left alone.

21. Punctuation

There are certain well-accepted rules of punctuation about which there is little or no disagreement, e.g.:

- a question is followed by a question mark;
- a colon precedes a list;
- a possessive requires an apostrophe;
- in the structure "A, B, and C " there should be a comma after B if three distinct entities are intended; and
- titles of written works, including conference papers and chapter titles, are enclosed in quotation marks (the underline not being available.)

When such standard rules of punctuation, verifiable in the authorities, are violated, the Facility editors should correct the error.

There are other areas of punctuation that are less clear-cut and where personal preference may determine the punctuation used, e.g.:

- use of a semicolon in lieu of a period to separate two conceptually-related sentences;
- use of a comma after a phrase within a longer sentence, to indicate a "breathing space";
- eliding or not eliding dates, (e.g., "1980-1982" or "1980-82"); and
- use of a hyphen to relate more closely two words that could just as well be separated (e.g., problem-solving/ problem solving; free-form/free form)[4]

---

[4] NOTE: But see Chicago "Compound Words," 6.24-31.

In these more "optional" areas, where either form used is "correct," the Facility editors should not intrude their preferences, but should go with whatever the author or Clearinghouse abstractor wrote, *as long as consistency is maintained within a given abstract*. As with numbers and capitalization, punctuation matters have little or no effect on computerized retrieval.

22. Capitalization

There are commonly accepted capitalization rules that should be adhered to, e.g.:

- months of the year are capitalized;
- seasons of the year are *not* capitalized;
- names of specific entities are capitalized (Valium drug, Helvetica type, Dental Students Attitudes' Test, Project OSIRIS); and
- "west coast" is *not* capitalized.

The *GPO Style Manual* and the Chicago *Manual of Style* agree on most of the rules for capitalization, but there are significant differences[5]. When standard rules of capitalization (as contained in *either* of the two principal authorities used by ERIC) are violated, the Facility editors should correct the error. Capitalization practices that can be supported by either authority should be permitted to stand.

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[5] NOTE: ERIC lower cases *all* articles, conjunctions, and prepositions in a title (unless they are the first or last word of the title), in accordance with Chicago 7.123), whereas GPO (3.52) capitalizes 4-character prepositions (such as "with").

POSTSCRIPT

The following quotations were assembled by Robert Collison and appear at various places in his book *Abstracts and Abstracting Services*. They are repeated here, with attribution, for the insight they can provide into the art of abstracting.

Since no one has ever defined a good abstract, the future of abstracting, professional or amateur, seems assured.

...L. Vanby

Abstracts were, of course, strongly opposed by those who felt that if God had intended them to publish abstracts they would not have published full papers in the first place.

...Derek de Solla Price

Abstracts provide the capability to concentrate within a single publication knowledge that is recorded in a multitude of research papers and technical reports.

...Irving M. Klempner

The abstract was described as a method devised several centuries ago to cope with excessive publication. It is no longer able to cope...

...Mary L. Tompkins

Abstracts rarely give the exact information the reader wants to know.

...Marian P. Anderson

The automatic abstracts derivable by present techniques require human editing to achieve adequate communicability.

...System Development Corporation

The production of an abstract journal seems to be a continuing fight against error.

...Charles L. Bernier

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Section VII: Indexing

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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SUMMARY OF SIGNIFICANT RULES

1. Descriptors used in the indexing process must be in the structured vocabulary of the *Thesaurus of ERIC Descriptors*. Proposed Descriptors are entered in the Identifier field until approved and implemented in the *Thesaurus*. (See **Section VIII, Part 1**, for adding terms to the *Thesaurus*.)

2. The Identifier field, in addition to its use for proposed Descriptors, is used to index the names of specific entities, such as projects, pieces of legislation, persons, places, organizations, tests, groups, and items of equipment. Identifiers must either be in the *Identifier Authority List* (IAL) or conform to the precedents (format rules) of the IAL. (See **Section VIII, Part 2**, for rules for new Identifiers).

3. "Major" subject matters of the document[*], whether indexed as Descriptors or Identifiers, must be preceded by an asterisk (*) to distinguish them from less substantial subject matters or "minor" terms. The following kinds of terms should be avoided as major, where possible:

   (a) Educational level, age level, methodology, publication/document type, or population terms, unless they are the subject of the document.

   (b) Multiple terms beginning with the same word, thereby causing unnecessary repetitive access in the printed indexes.

   (c) Broad terms that lack discrimination (see list in **Figure VII-10**) and that otherwise might be too heavily posted in a single printed index.

4. At least one (1) major Descriptor must be assigned to every document in the database. No more than 5 major Descriptors and 2 major Identifiers, or 6 major Descriptors and 1 major Identifier, are allowed.

5. The total number of assigned Descriptors per document may not exceed 700 characters, including punctuation and spaces (about 30 terms). The field size for Identifiers is 500 characters (fewer than 20 terms). The average number of index terms actually experienced for RIE accessions (ED numbers) is twelve (12). The average actually experienced for CIJE accessions (EJ numbers) is ten (10). (RIE documents are usually larger than CIJE articles, and larger items usually need more index terms.)

6. Index in depth, or exhaustively, all significant concepts covered in the document.

7. Index to the level of specificity of the subject matter covered by the document. Do not index "up" to higher generic levels than the document actually deals with. Also, do not overindex "down" to every sub-element mentioned in the document.

8. Index the document and exposition in hand; avoid indexing implications, possible uses, and other aspects referred to, but not actually dealt with.

9. Index on the basis of the entire document, not just a part such as the "Introduction" or "Conclusions."

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[*] "Document" is used here to refer to both documents and journal articles, both of whose bibliographic citations comprise the ERIC database.

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10. If a document is concerned with a particular educational (grade/academic) level, the indexer must index to that level. Few documents do not need an educational level Descriptor. To avoid overlooking this requirement, indexers should acquire the habit of indexing educational level first, before any other indexing is done. (See **Figure VII-2** for the 14 mandatory "educational level" Descriptors.)

11. Insofar as possible, index terms should embody the other data elements (title, abstract/annotation, etc.) of a citation. This helps to justify the assigned terms and provides reassurance to the user. However, it is important to remember ***not*** to substitute ERIC vocabulary terms in an abstract in place of the author's own words. By using a controlled vocabulary for its indexes and the author's language for its abstracts, ERIC provides maximum flexibility and accessibility in searching and retrieval.

12. Index terms are written with initial capital letters (except for acronyms). Except when used as the initial word, articles and connectives (prepositions and conjunctions) are not capitalized in a Descriptor. Exceptions to this rule occur in certain Identifiers, e.g., "Graduate (The)" (see **Figure VII-11**).

13. Index terms are written without punctuation or special characters, with the sole exception being parentheses (to enclose a qualifier).

14. Overindexing and underindexing both should be avoided. The excessive use of terms beginning with the same word can lead to overindexing, as can the unrestrained listing of every minuscule concept contained in a smaller document. Underindexing usually results from failure to assume the searcher's point of view.

15. When indexing cross-scope documents, indexers should consult the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* (**Appendix C**) for the "in-house indexing rules" of the other Clearinghouses, and the *ERIC Clearinghouse Scope of Interest Guide* (**Appendix A**) which lists other Clearinghouses' most frequently used Descriptors.

16. Indexers should always try to put themselves in the place of the user or searcher by asking two questions: Can the specific topic(s) covered by the document be retrieved by my assigned index terms? Would I be satisfied to retrieve the document in a search using my assigned terms (especially, my assigned major terms)?

VII. INDEXING

A. Introduction

Any collection of books, articles, reports, or other recorded information, is of value only when the items in the collection are accessible and can be retrieved. The purpose of indexing is to be able to locate items in a collection according to the characteristics of those items. Access points may be virtually any of the fields of data recorded for the items, e.g.:

- personal author;
- title;
- report number;
- contract/grant number;
- corporate source;
- language;
- accession number;
- subject;
- target audience;
- publication type.

The creation of the various non-subject data elements is usually called "Descriptive Cataloging"; the creation of the subject-oriented data elements is usually called "Subject Indexing." This section is concerned with the latter activity, i.e., establishing access by subject matter. The "indexing" of non-subject data is discussed in Section V, "Cataloging."

The ERIC Technical Steering Committee's 1989 *ERIC Indexing Handbook (Clearinghouse Indexing Practices)*, containing summaries of in-house, scope-specific indexing practices (ERIC Clearinghouse-by-ERIC Clearinghouse), as well as a general list of important indexing reminders, has been included in the *ERIC Processing Manual* (EPM) as Appendix C.

B. Subject Access

An indexer can establish subject access to the items in a collection in various ways:

- assignment of conventional "Subject Headings," as can be found on library catalog cards, e.g., "RUSSIA---POLITICS AND GOVERNMENT---POST-SOVIET ERA, 1992-"

- assignment of the item to a position (identified by number) in a classification scheme, such as the Dewey Decimal Classification or the Library of Congress Classification, e.g., 510.78 or QA76.53.

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- identification of key words (as opposed to trivial words) in the title (and perhaps abstract) of the document.[1]
- assignment of index terms from controlled lists of words and phrases, cross-referenced to show synonymous, hierarchical, or other purposeful relationships or characteristics; these terms are called variously "tags," "descriptors," "unit terms," etc.

Subject indexing in ERIC is of the last type. The principal index terms are called "Descriptors," and the techniques followed are generally those that have been developed over the years under the rubric "Coordinate Indexing." It is not the task of this section to discuss all types of indexing. It is necessary, however, to provide some explanation of the nature of, and the rationale behind, Coordinate Indexing.

C. Coordinate Indexing

1. General

Coordinate Indexing arose from the need to perform indexing in depth. The report literature that began to burgeon in the 1940s could not be adequately characterized, in terms useful for working scientists and technicians, via two or three library subject headings affixed to 3x5 catalog cards. Those working with the report literature desired rather to attach a term or tag to every significant concept in a report. This often involved 10-20 concepts. The possible combinations of these many concepts, if recorded in subject heading form, would have been prohibitive.

The solution arrived at was to largely eliminate the relationships between concepts and rely on unit concepts. The relationships are then picked up or re-constructed by combining several terms in the search procedure. The assignment of index terms that are meant to be put together or coordinated at the time a search is conducted is called "Coordinate Indexing," because the searcher must coordinate the index terms to arrive at the desired result.

2. Searching a File That Has Been Coordinate Indexed

The entire justification for the indexing process lies in the retrieval/searching process. It is important, therefore, for the indexer to understand how searches are conducted. It is a standard admonition to indexers for them to put themselves in the shoes of the searcher.

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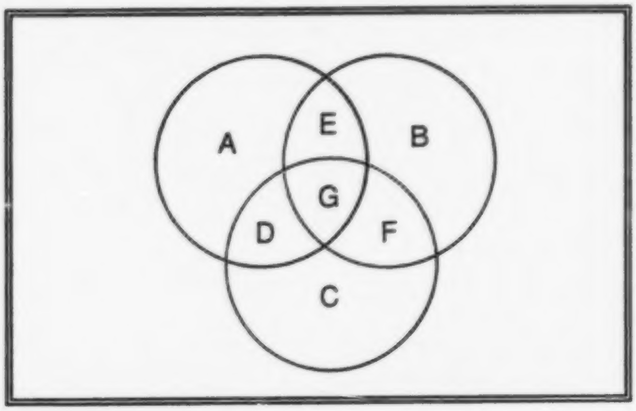
[1] The word "document(s)" is used throughout this section to refer to both documents (ED-numbered ERIC accessions) and journal articles (EJ-numbered ERIC accessions). Documents are announced in the monthly abstract journal *Resources in Education* (RIE). Journal articles are announced in the monthly abstract journal *Current Index to Journals in Education* (CIJE).

The strategy used in searching in a coordinate indexing system is generally based on set theory and Boolean** logic. Drawn below is a Venn** diagram consisting of three overlapping circles, labeled A, B, and C. The areas of overlap of two circles are labeled D, E, and F. The overlap of all three is called G.



Let us suppose:

- Circle A represents the documents in the ERIC collection indexed by the Descriptor TEACHING METHODS.
- Circle B represents the documents indexed by the Descriptor SCIENCES.
- Circle C represents the documents indexed by the Descriptor DISADVANTAGED.

The areas of overlap (D, E, and F) represent those documents indexed by two of the Descriptors. Area G represents those indexed by all three Descriptors.

In phrasing a search question requesting material on methods of teaching science to the disadvantaged, the searcher might specify those documents indexed by both the terms TEACHING METHODS and DISADVANTAGED, i.e., those documents in Areas D and G.

Or the searcher might ask for documents indexed by TEACHING METHODS and either DISADVANTAGED or SCIENCES. This would be those documents in Areas D, E, and G. If the searcher decided to look at documents indexed by TEACHING METHODS and SCIENCES, but not in the area of the DISADVANTAGED, this would be those in both A and B, but not in C, resulting in Area E only, excluding area G.

A search for items indexed by all three of the terms (TEACHING METHODS and DISADVANTAGED and SCIENCES) would be restricted to Area G.

** See Glossary for definitions.

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All combinations above are specified using the Boolean logical operators AND, OR, NOT.

- AND indicates those things common to two or more groups.
- OR indicates those things in two or more groups, whether or not in common.
- NOT indicates those things not in a particular group or groups.

As can be seen, searching in this way quickly gets complicated and requires special assisting devices such as "double-dictionaries" or computers to help make the coordinations. Manual searching can conveniently coordinate only two terms.

3. Terminology in Coordinate Indexing

In discussing Coordinate Indexing, it is important to have available the standard terminology that has developed.

a. Pre-Coordinated Term

This is a concept that is prevalent enough in a given system to warrant representation by a single unique term rather than by terms representing its several components. For example, the ERIC system contains both the single terms TEACHERS and ATTITUDES. The concept "Teacher Attitudes" could be represented by the assignment of these two separate terms. However, this concept appears frequently enough and is searched frequently enough to warrant pre-coordinating the terms (that is, at indexing time, prior to searching) into the single useful index access point TEACHER ATTITUDES. The ERIC system pre-coordinates terms both on the basis of utility, as indicated above, and in order to have maximally useful terms appearing in its printed indexes, which are manually searched.

(Note that a complex concept, represented by a multiword pre-coordinated term, can still itself be post-coordinated at search time to form an even more complex concept, e.g., INSERVICE TEACHER EDUCATION and COMPUTER ASSISTED INSTRUCTION.)

b. Post-Coordination

This refers to the action, after (or post) the indexing process, of coordinating two or more terms to make up the desired concept. For example, rather than develop the distinct concept "Italian Speakers" or "Italian Speaking" into a single pre-coordinated term, it might be decided to rely on post-coordination of the two separate terms ITALIAN and NATIVE SPEAKERS.

c. Posting

Posting means to record. A document accession number can be "posted" to a list of similar numbers that have all been indexed by the same term. An index term can, in turn, be "posted" along with other such terms, to a document record. The first usage is the most common; the accession numbers are sometimes referred to as "postings."

d. False Drops

In a coordinate indexing system, the terms assigned to a document can often go together in ways they are not meant to. A retrieval based on such an unintended coordination is called a "false drop." For example, a document could be indexed by the terms ACTIVISM, STUDENTS, and TEACHERS. The document dealt with "student activism," but a search aimed at "teacher activism" might retrieve it as a "false drop."

e. Roles and Links

These devices to improve retrieval results are not used in the ERIC system.

- "Roles" refer to additional information attached to index terms to designate the functional sense in which they are used. For example, an extra tag could be added to terms to identify those that refer to elements of the curriculum (as distinct, say, from areas of research).

- "Links" refer to methods of indicating which Descriptors assigned to a document may legitimately be coordinated. Descriptors from the same area of the document are given some similar additional tag. The process is very like the standard library practice of "analyzing out" selected distinct sections of a larger work, treating them as if they were documents in themselves.

D. Indexing for ERIC—Purpose and Approach

The purpose of indexing for ERIC is to provide subject access to the documents announced in RIE and to the articles announced in CIJE. The indexer, or abstractor/indexer, examines the document, chooses the concepts to be indexed, and translates these concepts into the indexing terminology of the system. In the ERIC system, a modified coordinate indexing approach is used and the controlled vocabulary or authority list containing the index terms that may be used is the *Thesaurus of ERIC Descriptors*. The *Thesaurus* lists all terms that can be used by the indexer, together with a display of terms that are Broader, Narrower, or Related to the given term. Cross-references are made from Synonyms, or other terms not to be used, to authorized index terms.

A detailed description of the role and function of the *Thesaurus*, and a bibliography of closely related lexicographic materials, are usually included in the published edition of the *Thesaurus*.

E. ERIC's Modified Coordinate Approach

An indexer in the ERIC system must have two distinct objectives:

- In-depth extraction of all significant concepts in the document so that the machine-readable database will be manipulatable by these tags and searchers using computers can therefore access them;
- Selective identification of the major concepts in the document for use in preparing printed indexes to RIE and CIJE, and for subsequent manual searching (as well as computer searching).

The in-depth indexing may safely use virtually any term in the authority list (although the use of some very broad, single-word concepts can be suspect). The selective indexing for the benefit of the printed index, on the other hand, must keep in mind that manual searching is limited in its ability to coordinate several terms. Therefore, the terms selected to represent the major concepts of the document should in general be at a level of specificity that will be useful to the user. For example, use of the specific single term BIOCHEMISTRY would be preferable to use of the two broad terms BIOLOGICAL SCIENCES and CHEMISTRY, and would save the manual user considerable work. The selective indexing is also limited in the number of terms that it can assign due to physical and economic limits on the size of the printed indexes, thereby also arguing for care in finding the specific, perhaps pre-coordinated, term, rather than several less well-targeted terms.

F. Nature of the Educational Literature

Virtually anything can be taught. The field of education, therefore, comprises many subjects and is often dependent on or derived from work that is basically in other disciplines. The literature of education takes many forms. ERIC deals with all significant educational documents regardless of format, e.g.:

- research reports;
- journal articles;
- speeches;
- papers presented at meetings;
- state-of-the-art surveys;
- statistical compilations;
- teacher guides;
- reviews;
- government hearings and legislation;
- curriculum materials;
- bibliographies;
- newsletters, etc.

The methods of inquiry used in these various formats range from the empirical to the philosophically discursive. What controls selection (see **Section III**) is overall quality and the judgment as to whether the item would be of interest and value to others.

The literature collected, announced, and indexed by ERIC exhibits perhaps more variability than that of any other information system. A laboratory study on the nature of long-term memory, or a dissertation on the educational philosophy of John Dewey, may be announced on the same page as a guide to kindergarten teachers on using finger paints. The literature of education is multifaceted in nearly every sense:

- its topics;
- its approaches and methods;
- its formats;
- the users for whom the literature is intended.

G. Educational Community User Groups

The users of any information system may be divided into two main groups:

1. ***Internal Users* of the System**
(information specialists, librarians, document processors, etc., employed by components of the system)

The "internal" users tap the ERIC file in response to a variety of needs:

- telephone and correspondence inquiries;
- searching and preparing bibliographies for clients;
- preparing information analysis products (IAPs) and other publications.

Working in basically the same environment as the indexers, it is relatively easy for the internal users of the system to provide feedback to the indexers (at their own Clearinghouse and at others also) as to access points that are needed and that the indexer should provide whenever relevant. It is common within the ERIC system for each Clearinghouse to have its particular "indexing rules" and lists of "most frequently used index terms," which the indexer makes use of specifically to meet internal information needs. (See *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* [Appendix C], which provides the in-house rules, and *ERIC Clearinghouse Scope of Interest Guide* [Appendix A], which lists the Clearinghouses' most frequently used Descriptors.)

2. ***External Users* of the System**
(teachers, scholars, researchers, lay people, etc., in the field)

The "external" users are a heterogeneous group ranging across a broad spectrum from:

- the generalist to the specialist;
- the trained member of the educational community to the untrained lay public;
- the sophisticated basic researcher to the applied sector occupied by administrators, teachers, legislators, etc.

Indexers must keep in mind these various groups and not slant their indexing solely toward one class or level of user. ERIC indexing must satisfy the needs of all of the above, striking a balance between overindexing, which can create "red-herrings" for searchers, and underindexing, which can effectively hide a document from potential users.

Feedback from external users to indexers is often difficult to obtain, but can be extremely valuable as an indicator both of access points needed by the field and new index terms that should be added to the *Thesaurus*.

H. Indexing Tools

There are several publications that are either necessary or very helpful for the indexer to consult during the indexing process:

1. *Thesaurus of ERIC Descriptors*

All Descriptors used by an indexer or searcher must be in the *Thesaurus of ERIC Descriptors*. The *Thesaurus* is the major reference used in translating educational subject matter into terminology acceptable by the system. It contains approximately 10,000 vocabulary terms, of which approximately 5,600 are main-entry Descriptors and 4,400 are non-indexable Use references and "dead" terms.

The *Thesaurus* is an authority list that provides control over the indexing vocabulary and helps to ensure consistent use of terms throughout the system. The *Thesaurus* lists all terms that have been formally accepted by the system. Terms that are not completely self-evident are provided with definitions/Scope Notes. Cross-references are made from Use references or synonyms (terms not to be used in indexing) to the approved word forms. Most main terms carry class membership (generic relationships) information in the form of terms that are "Broader" and "Narrower" to the given term. Other types of relationships are noted via the display of "Related" terms.

The *Thesaurus* brings to the attention of the indexer those terms that might be employed in making a search for a document, and it brings to the attention of the searcher those terms that might have been employed by the indexer in describing documents pertinent to the searcher's question. The structured nature of the vocabulary is intended to guide both sets of users towards similar conclusions and actions. A thorough knowledge of and familiarity with the *Thesaurus* is required of all indexers.

The data presented in the *Thesaurus* are available in four formats, each providing the indexer with a different way of entering the *Thesaurus* and moving through it to find the exact terms to use in indexing.

- The Alphabetical Display presents all terms, including Synonyms, arranged alphabetically, together with definitions and complete cross-reference structures. Postings counts and add dates are included. This complete context makes it essential that this display be consulted by indexers before a final decision is made to use any particular Descriptor.

- The Rotated Display provides a permuted alphabetical index to all words that form Descriptors in the *Thesaurus* (Synonyms included). In other words, PASS FAIL GRADING appears under PASS, under FAIL, and under GRADING. This display is useful in determining all usages of a particular word in the *Thesaurus*, without respect to its position in a phrase or multiword Descriptor. It tends to group related terms that may often be separated in the main Alphabetical Display, thus aiding indexers in performing a more complete search of the *Thesaurus*, search analysts in translating their inquiry into the language of the system, and subject analysts in structuring new Descriptors.

- The Hierarchical Display presents sets of generic tree structures showing, for every term in the *Thesaurus*, the trail of narrower terms below it and broader terms above it, each carried to the farthest extreme. Subordination (or class membership) is indicated via indentions, as in the partial tree shown below:

```
BT
▲                  :LANGUAGES
├─ FILE POINT ───►AMERICAN INDIAN LANGUAGES
│                  .ATHAPASCAN LANGUAGES
▼                  ..APACHE
NT                 ..NAVAJO
```

  "American Indian Languages" has above it the Broader Term "Languages" and immediately narrower to it the term "Athapascan Languages." "Apache" and "Navajo" are in turn both Narrower Terms to "Athapascan Languages."

  The Hierarchical Display can be useful to the indexer in finding the most appropriate level of specificity to which to index a document.

- The Descriptor Group Display arranges each of the Descriptors in the *Thesaurus* into one (and only one) of several broad categories, e.g., "Equipment." The display shows each of these categories together with alphabetic arrays of the terms that have been assigned to each. The display is provided for browsing and rapid scanning of large numbers of Descriptors that may be of interest within a broad area. It is meant to provide suggestions and to be of general assistance to those using the *Thesaurus* for indexing, searching, and the structuring of new Descriptors. It is not a formal classification scheme. Each Group is defined by a Scope Note and is represented by a code number.

2. *Identifier Authority List* (IAL)

Identifiers are semi-controlled vocabulary terms used to supplement Descriptor indexing. They are usually proper names of specific entities, including organizations, projects, persons, items of equipment, geographic locations, legislation, groups of people, literary or artistic works, etc. Their nearly infinite numbers and frequently transient tendencies usually make them unsuitable for *Thesaurus* consideration.

Identifiers also may be generic concepts, either new to education or with accumulating usages in the database, that have yet to be approved as *Thesaurus* Descriptors. All candidate Descriptors, awaiting entry to the *Thesaurus*, are indexed as Identifiers.

Approximately 50,000 authorized Identifiers, edited for format and informational content, are listed in the *ERIC Identifier Authority List* (IAL) or its cumulative supplement. (ERIC Identifiers that are in the database, but not in the IAL, await evaluation and IAL consideration, corrective activities occurring as resources permit.)

Indexers use IAL Identifiers to provide additional/supplemental indexing specificity that is not always possible with Descriptors alone. Searchers, in turn, find the diverse terminology of the IAL helpful for fine-tuning their search strategies.

In addition to the normal word order position, inverted formats and other possible variations should be checked before creating a new Identifier for RIE or CIJE. If a term is not found in the IAL, the indexer should observe the precedents of the IAL, and the guidelines and standards for establishing Identifier name forms found in Section VIII, Part 2. New Identifiers should use the author's language provided that it conforms to the IAL precedents and guidelines.

The IAL is arranged in two displays:

- The main Alphabetical Display lists all authorized ERIC Identifiers, together with Scope Notes, Use/UF cross-references, postings counts, and codes identifying the broad category to which a term belongs. This complete context makes it essential that this display be consulted by indexers before a final decision is made to use any particular Identifier.

- The supplementary Category Display lists all IAL Identifiers under the following 20 broad headings:

    - Conferences/Meetings
    - Curriculum Areas
    - Equipment (including computer programs)
    - Facilities
    - Geographic Locations
    - Groups (ethnic)
    - Groups (occupations)
    - Groups (other)
    - Health-Related (including psychology)
    - Historical/Special Events
    - Languages/Linguistics
    - Laws/Legislation
    - Methods/Theories
    - Miscellaneous
    - Organizations/Institutions
    - Personal Names
    - Projects/Programs
    - Science & Technology
    - Tests/Testing
    - Titles (literary and artistic)

3. ERIC on CD-ROM, ERIC Online, and/or the Printed Indexes of *Resources in Education* and *Current Index to Journals in Education*

CD-ROM or online searches of the ERIC database, or, if those options are unavailable, looking through prior issues of the RIE and CIJE announcement journals themselves, can be useful:

- in determining how particular terms have been used in the past, i.e., what kinds of documents they have been applied to;
- in determining how documents in a particular series and/or on the same subject have been indexed in the past.

If available, CD-ROM or online searches are additionally useful:

- in determining the most recent postings of a term, whether they were in RIE or CIJE, and whether they were major or minor;
- in determining whether two or more terms have been used together with any frequency to index the same kinds of documents.

It is helpful to users if documents in the same series are given a consistent indexing treatment and can be relied on to be retrievable via the same terms if they deal with the same subject.

4. *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* **(EPM Appendix C)**

This handbook, originally prepared by the ERIC Technical Steering Committee and released in May 1989 as a supplement to the EPM Section VII — "Indexing," has been updated and is now included in the EPM as a Appendix C. It contains summaries of the in-house, scope-specific indexing practices, ERIC Clearinghouse-by-ERIC Clearinghouse, prepared by the indexing staff at each of those Clearinghouses. Inevitably some documents overlap between and among Clearinghouses. Often the Clearinghouse doing the processing of such documents can gain insight as to how the other Clearinghouse(s) would have indexed the document had it been assigned to them. The purpose of the *Handbook* is to provide guidance concerning the indexing idiosyncracies of the Clearinghouses, for use in cross-scope-area indexing (and searching).

The *Handbook* also contains a summary of important ERIC indexing reminders, based on comments and discussions at ERIC technical meetings; the summary has been used as a handout at several indexing seminars and database user meetings to highlight what ERIC indexing is, that is, what it consists of and what it seeks to accomplish.

For cross-scope-area indexing, the *Handbook* is used in conjunction with the ERIC Clearinghouse *Scope of Interest Guide*.

5. *ERIC Clearinghouse Scope of Interest Guide* **(EPM Appendix A)**

This guide provides a complete description of each Clearinghouse's area of coverage. It also presents lists, or mini-thesauri, of those Descriptors most frequently used by each Clearinghouse.

Examination of this tool and the *ERIC Indexing Handbook* can prevent a narrow or parochial indexing approach and can lead to indexing from several potentially useful viewpoints, rather than just that of the particular Clearinghouse in possession of a cross-scope-area document.

6. ***ERIC Abstractor/Indexer Workbook* (ED 207 614)**

This workbook, like the *Indexing Handbook*, is another product of the ERIC Technical Steering Committee. Originally prepared in 1978, it was revised in 1981 to be compatible with various *ERIC Processing Manual* changes, including new mixed "informative/indicative" abstracting rules and changes in indexing necessitated by the completely revised 1980 ERIC *Thesaurus*.

Although requiring periodic updating, the workbook is a valuable training device for ERIC abstractor/indexers, especially those who are new to the system. With a current *Thesaurus* and IAL in hand, it is a relatively simple matter to update the indexing examples as one goes through the workbook exercises.

7. **Other Reference Sources**

Dictionaries, encyclopedias, glossaries, handbooks, and major textbooks can all aid the indexer in translating the language of a given document into usable index terms. The jargon of specialized fields must be avoided in indexing in favor of terms more widely and authoritatively accepted. Terms having different meanings in different fields must not be confused with one another.

Reference works of particular value in researching Descriptors are listed in the bibliography in Section VIII, Part 1, item C.1.e.(3), "Appearance in Other Thesauri." Reference works of particular value in researching various kinds of Identifiers are listed in Section VIII, Part 2, in the separate descriptions of the Identifier categories (geographic locations, project/programs, tests/testing, etc.)

Another ERIC product that can be useful in indexing is the collection of cumulative RIE indexes on microfiche published annually by the ERIC Document Reproduction Service (EDRS). Included are separate indexes for subject, author, institution, title, Descriptors, and Identifiers, each from the beginning of ERIC through the most recent full year. The Descriptor and Identifier Indexes are in effect usage reports of Descriptors and Identifiers in the RIE portion of the database. Descriptors and Identifiers are listed alphabetically in separate reports, with accession numbers (identified as major or minor) and numbers for major, minor, and total usages provided under each entry.

Clearinghouses should keep records of their specific in-house indexing decisions for future reference by their own indexing staffs, as well as other ERIC indexers via documentation in the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* [Appendix C].

I. Indexing Process

1. General

Indexing begins with the examination of the document. Both indexing and abstracting for the ERIC system should be based on the entire document. Nevertheless, experienced indexers know that certain sections of documents yield useful information more readily than others. Knowing where to look and to concentrate one's attention can be important to capturing the essence of a document in the allotted time.

Index the document in hand, not the document the writer would like to have written or intends to write the next time. Do not confuse speculation, or referrals to implications and possibilities, with real content.

The indexer should attempt to capture all significant concepts treated in the document. This is called indexing in-depth or exhaustive indexing. The indexer should index concepts at the generic/specific level actually covered by the document, i.e., index as generically as necessary, but as specifically as possible. For example, if the document concerns itself solely with the Navajo language, index to NAVAJO; do not index to the "higher" or more general levels LANGUAGES or AMERICAN INDIAN LANGUAGES. Consistency is important in indexing, both among more than one indexer or within the performance of a single indexer (self-consistency). Such consistency, however, is difficult to attain. Indexers should always:

- proceed by rule, rather than by subjective decision;
- be aware that specific entities (such as geographic locations, project names, test names, individuals, etc.) though not in the *Thesaurus* are, nevertheless, indexable via the Identifier field.

A full discussion of the different types of Identifiers and how to structure such terms is provided in Section VIII, Part 2.

All concepts selected as significant in the document must be translated into either existing Descriptors or existing or proposed Identifiers. Use the *Thesaurus* or IAL to do this. Never proceed on the basis of memory. A minor discrepancy in the spelling or ending of a Descriptor will lead to its later rejection by the ERIC software as invalid. For example:

ACCEPTABLE:	AMERICAN INDIAN LANGUAGES
INVALID:	AMERICAN INDIAN LANGUAGE

The same type of minor difference in an Identifier will not cause it to be rejected, but will lead to "scattering." (Scattering occurs when multiple versions of the same basic term appear on the file and in the indexes.) Scattering causes problems during retrieval and must be minimized. For example, if a searcher wanted to find instances where the UNIVERSITY OF CALIFORNIA LOS ANGELES was the subject of a document, all possible variations of that term that indexers might have employed would have to be searched, if the file contained a lot of "scatter," e.g.:

CALIFORNIA UNIVERSITY (LOS ANGELES)
CALIFORNIA UNIVERSITY AT LOS ANGELES
CALIFORNIA, UNIVERSITY OF (LOS ANGELES)
UCLA
UNIVERSITY OF CALIFORNIA (LOS ANGELES)
UNIVERSITY OF CALIFORNIA AT LOS ANGELES
UNIVERSITY OF CALIFORNIA IN LOS ANGELES
UNIVERSITY OF CALIFORNIA LOS ANGELES
UNIVERSITY OF CALIFORNIA, LOS ANGELES

An indexer must decide which concepts in a document are to be considered "MAJOR" and which "MINOR." This is done in order to restrict the size of the printed subject indexes and is also useful later in machine searching in those instances where relevance is more important than recall. MAJOR concepts, whether expressed as Descriptors or as Identifiers, must be asterisked (*). For example:

USED AS MAJOR TERMS	USED AS MINOR TERMS
*FAMILY PLANNING	FAMILY PLANNING
*CONTRACEPTION	CONTRACEPTION

The purpose of indexing is to make a document retrievable. At all times the indexer should evaluate the concepts being selected in terms of a hypothetical searcher:

- Would a searcher after a particular concept be satisfied to retrieve this document?
- Would the searcher be disappointed at the amount of information the document contained on the indexed concept?

Indexing is often described as being both a science and an art. It is scientific in that experimentation and practice over the years have derived good and consistent results. It is an art, however, in that as long as it is done by human beings it remains an expression of the individual judgment of an indexer and is not subject to rigorous consistency and exact results. The guidelines that follow do not and cannot always involve hard and fast rules. They provide indexers with a foundation and a philosophy, but only long experience and practical judgment can develop an expert.

2. Examination of the Document

(Training or practice exercises, using actual ERIC documents, are provided in the *ERIC Abstractor/Indexer Workbook*, ED 207 614.)

The experienced indexer is familiar with the information system (documents, vocabulary, users, etc.) and, in the examination of documents, has learned to focus attention efficiently in several ways, thereby permitting perhaps as few as one or two passes through the document for its evaluation and analysis. The inexperienced indexer, on the other hand, typically requires several passes through the document and engages in extensive paging back and forth.

The indexer should first concentrate on building a basic frame of reference for a given document:

- the document's source (personal author, corporate author, and sponsoring organization);
- its publication date and timeliness;
- its format and general organization;
- its relationship to the entire system, and its potential audience.

The indexer should come away from this brief step with a good idea of who did it, when, why, for whom, who paid, why it was selected, who might be interested, magnitude, etc.

The next step is to inventory and analyze the physical and organizational content of the document. Be aware that content varies greatly among documents.

- Title;
- Abstract;
- Introduction/Preface/Foreword
  (which may include historical and theoretical background);
- Description of methodology, experimental design, objectives, materials used;
- Work performed;
- Discussion;
- Results;
- Illustrative material
  (graphs, charts, photographs, tables, diagrams);
- Conclusions;
- Summary;
- Recommendations for further work;
- References;
- Appendixes;
- Indexes.

With this information in hand, the indexer can then proceed to a more detailed analysis of the document's subject content. This is usually done in a more selective journalistic sequence, concentrating on those sections revealed by the inventory above to be most information-bearing. The indexer should attempt to verify his or her interpretation of each section against following sections. For example, the Title should be compared with the Abstract, the Abstract with the Summary, and so on, until a clear, verifiable, supportable picture of what the document is really about emerges.

The relationship between the indexing process and the abstracting process should be noted here. The individual who abstracts a particular document inevitably absorbs much information regarding that document. This information may be utilized in the indexing process. This is particularly easy if the abstractor and the indexer are one and the same person. Indexing terms may be noted marginally or mentally during abstracting for later use (by oneself or others). If the abstractor and indexer are the same person, then the learning-about-the-document process required to perform the one function overlaps with that required for the other function, thereby saving time overall. If the abstractor and indexer are separate individuals, then inevitably both must go through the same learning process, resulting in less efficient staff utilization.

Whether the abstract is author-provided or written or modified by an ERIC abstractor, it is a good idea to see that as many of the indexed concepts as possible also appear in the other data elements describing the document, including the abstract. This provides the user with a reassuring explanation as to why a particular index term was used. In cases where there is no apparent or obvious connection between an index term assigned and the rest of the document description, the user is left puzzled as to whether the item is relevant to his or her needs.

Indexers should note that the above advice refers to concepts, not words. That is, indexers should remember that an author's actual language should be used in an abstract and never changed or "translated" to match ERIC Descriptors and Identifiers. The abstract is reserved for the author's own words (the actual language of the document), while Descriptors and Identifiers provide the system's controlled access vocabulary. Keeping both the language of the system and the language of the author gives the searcher both controlled and free access to the ERIC database.

3. Identification of Indexable Information

(See also "Indexing Reminders" section of *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* [Appendix C].)

A primary rule is to index the document in hand. This rule may sound obvious, but it is easy to be trapped into indexing the implications, applications, projected uses, future directions, etc., of some documents rather than their actual content. This is a pitfall and should be avoided. For example, a bibliography of basic texts in adult education may have been originally compiled to support graduate study in adult education. Nevertheless, GRADUATE STUDY is not the subject matter of the document, but only one of the many possible applications. It should not be selected as an indexable concept.

Negative results can be as indexable as positive results, and as important to the user. For example, a research study may tend to disprove the hypothesis that participation in planning the educational program increases the student's desire to do well academically. The concept ACADEMIC ASPIRATION is definitely indexable insofar as it is one of the primary ideas (in this case a "dependent variable") that the research is investigating.

The indexer must always keep in mind that it is concepts that are being indexed, not merely the author's words in which the concept is expressed. An author may choose to use excessively exotic, obscure, specialized, mis-interpreted, colloquial, or otherwise unacceptable language. Do not engage in mere "word indexing." Isolate the concept and meaning behind the words and then choose the words the system has designated for the concept. (Of course, insofar as it is possible to use the language and terminology of the author and still observe this admonition, then the best of both worlds is served.)

For example, an author may use the term VOCATIONAL EDUCATION in discussing training programs that attempt to make adults employable by providing them with basic skills in reading, writing, and arithmetic. The *Thesaurus of ERIC Descriptors* defines this term, however, in a way that is at variance with this author's usage, as follows:

> *VOCATIONAL EDUCATION:*
>
> *Formal preparation for semiskilled, skilled, technical, or paraprofessional occupations usually below the baccalaureate degree.*

Examination reveals that the concept the author is really discussing is represented in ERIC by the Descriptor ADULT BASIC EDUCATION, which is defined in the *Thesaurus* as follows:

> *ADULT BASIC EDUCATION:*
>
> *Education provided for adults at the elementary level, usually with emphasis on communicative, computational, and social skills.*

As can be seen from the above, it should be kept in mind that authors do not necessarily use words precisely and that it is up to the information system to impose its own terminological order on a literature that speaks from many different viewpoints.

Mere mention of any concept within a document does not mean that it is indexable information. If the concept was the reason for the document to be written, or, if without the concept the document would not exist or would be altered significantly, then the concept is indexable information. The indexer should assume the posture of a skeptic who has to be convinced by good evidence of the appropriateness and applicability of any given concept.

To ensure comprehensive and uniform treatment of documents, indexers should always refer to a check list of indexable elements. The use of this check list will help guarantee reasonable exhaustivity in indexing. Documents entering the ERIC system usually contain the following elements of information, which are treated individually in detail immediately following this list:

- Population Concepts

  —Educational (i.e., Grade/Academic) Level
  —Age Level
  —Other Characteristics, e.g., ethnicity, religion, etc.

- Activities/Action Concepts; Methodology/Materials Concepts
- Curriculum Concepts
- Document Form/Type
- Identifiers
- Target Audience

a. Population Concepts

Population concepts categorize and identify the group or individual studied by the document or intended as the users of the document (see also item "f," Target Audience). Most important to ERIC users are terms identifying the population's:

- Educational (Grade/Academic) Level;
- Age Level.

However, other categories that may be applicable are:

- Occupation;
- Race or Nationality;
- Religion;
- Intelligence or Ability Level;
- Physical or Emotional Characteristics;
- Socioeconomic Characteristics;
- Sex.

Educational Level must be indexed when appropriate (i.e., when dealt with by documents or journal articles). Age Level should be indexed for materials concerned strictly with age-level populations. Detailed instructions on use of these "Levelers" follow below. All other population concepts are treated just as any other concepts, and their use is up to the discretion of the indexer.

Examples of some terms in the *Thesaurus* that represent these various population concepts follow:

- Occupation - e.g.,

ACCOUNTANTS
COOKS
COUNSELORS
LIBRARIANS
MEDICAL LABORATORY ASSISTANTS
OPTOMETRISTS
TEACHERS

Note: See also-- (a) list of Narrower Terms under term OCCUPATIONS, and (b) the Descriptor Group "OCCUPATIONS."

- Race/Nationality - e.g.,
  - AMERICAN INDIANS
  - ARABS
  - BLACKS
  - CHINESE AMERICANS
  - CUBANS
  - ESKIMOS
  - FILIPINO AMERICANS
  - HISPANIC AMERICANS
  - INDIANS
  - ITALIAN AMERICANS
  - JAPANESE AMERICANS
  - KOREAN AMERICANS
  - LATIN AMERICANS
  - MEXICAN AMERICANS
  - MEXICANS
  - NORTH AMERICANS
  - POLISH AMERICANS
  - PUERTO RICANS
  - SPANISH AMERICANS
  - WHITES
- Religion - e.g.,
  - AMISH
  - CATHOLICS
  - CHRISTIANITY
  - ISLAMIC CULTURE
  - JEWS
  - JUDAISM
  - PROTESTANTS
  - PURITANS
- Intelligence/Ability Level - e.g.,
  - ACADEMICALLY GIFTED
  - DEVELOPMENTAL DISABILITIES
  - HIGH ACHIEVEMENT
  - LEARNING DISABILITIES
  - ILLITERACY
  - MENTAL RETARDATION
  - SLOW LEARNERS
  - TALENT
- Physical/Emotional Characteristics - e.g.,
  - AMPUTATIONS
  - BLINDNESS
  - DEAFNESS
  - DEAF BLIND
  - DOWNS SYNDROME
  - DRUG ADDICTION
  - EMOTIONAL DISTURBANCES
  - HOSTILITY
  - HYPERACTIVITY
  - MENTAL DISORDERS
  - NEUROLOGICAL IMPAIRMENTS
  - PARANOID BEHAVIOR
  - PERCEPTUAL HANDICAPS
  - PHYSICAL DISABILITIES
  - PSYCHOSIS
  - SCHIZOPHRENIA
- Socioeconomic Characteristics - e.g.,
  - ADOPTED CHILDREN
  - ADVANTAGED
  - CRIMINALS
  - DELINQUENCY
  - ECONOMICALLY DISADVANTAGED
  - EDUCATIONALLY DISADVANTAGED
  - FOSTER CHILDREN
  - MIGRANTS
  - NOMADS
  - PRISONERS
  - REFUGEES
- Sex - e.g.,
  - EMPLOYED WOMEN
  - FATHERS
  - FEMALES
  - MALES
  - MOTHERS

(1) Educational (Grade/Academic) Level

Many Descriptors in the ERIC *Thesaurus* can be used to identify the educational level being studied or the educational level toward which a document or article is directed. (See **Figure VII-1** for a relatively complete list.)

Any of the terms appearing in **Figure VII-1** may be used to index a document to the specific educational level with which it deals. Because of the extreme importance of this particular indexing to the retrieval process, however, and because of the large number of terms available to the indexer, a special attempt is made, with the following guidelines, to reduce "scattering."

Fourteen (14) broad Descriptors in this group have been specially identified or defined as subsuming several of the more specific terms. These broad Descriptors and their definitions appear in **Figure VII-2**. One or more of these special Descriptors must always be used to index educational level when the document deals with such levels. To assure assigning of an educational level Descriptor when appropriate, indexers are encouraged to select the educational level term first, before further indexing.

An educational level term of major or minor status should be on every document except in cases of:

- Documents where educational level is incidental and not specifically treated.
- Documents that apply to any or all educational levels equally.

The educational level term should be majored only when the central focus of the document is on the subject of that educational level. (See discussion of Major/Minor terms in **Section VII.I.5.b.**)

An occasional document will need to carry multiple educational levelers. For example, a document on Catholic schools having considerable statistical data for both K-12 schools and institutions of higher education should be indexed by ELEMENTARY SECONDARY EDUCATION and HIGHER EDUCATION. For the vast majority of documents, however, it is appropriate to assign only one educational leveler.

Note that there is a "broader-narrower" relationship between some of the 14 broad level Descriptors (not corresponding exactly to the strict hierarchical relationships of the ERIC *Thesaurus*). The use of a narrower term would, of course, obviate the need to also use its broader term, and vice versa. For example, a document indexed by PRESCHOOL EDUCATION need not also be indexed by EARLY CHILDHOOD EDUCATION. (See discussion on indexing specificity in **Section VII.I.5.a.**)

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ADULT BASIC EDUCATION
ADULT EDUCATION
ADULT PROGRAMS
COLLEGE BOUND STUDENTS
COLLEGE CURRICULUM
COLLEGE FRESHMEN
COLLEGE GRADUATES
COLLEGE INSTRUCTION
COLLEGE PREPARATION
COLLEGE PROGRAMS
COLLEGE SENIORS
COLLEGE STUDENTS
COLLEGES
COMMUNITY COLLEGES
DOCTORAL PROGRAMS
EARLY CHILDHOOD EDUCATION
ELEMENTARY EDUCATION
ELEMENTARY SCHOOL CURRICULUM
ELEMENTARY SCHOOL STUDENTS
ELEMENTARY SCHOOLS
ELEMENTARY SECONDARY EDUCATION
EXTERNAL DEGREE PROGRAMS
GRADE 1
GRADE 2
GRADE 3
GRADE 4
GRADE 5
GRADE 6
GRADE 7
GRADE 8
GRADE 9
GRADE 10
GRADE 11
GRADE 12
GRADUATE STUDENTS
GRADUATE STUDY
HIGH SCHOOL EQUIVALENCY PROGRAMS
HIGH SCHOOL FRESHMEN
HIGH SCHOOL GRADUATES
HIGH SCHOOL SENIORS
HIGH SCHOOL STUDENTS
HIGH SCHOOLS
HIGHER EDUCATION
INSERVICE EDUCATION
INTERMEDIATE GRADES
JUNIOR HIGH SCHOOL STUDENTS
JUNIOR HIGH SCHOOLS
KINDERGARTEN
KINDERGARTEN CHILDREN
MASTERS PROGRAMS
MIDDLE SCHOOLS (= Grades 4-9 or some segment thereof)
NONCOLLEGE BOUND STUDENTS
NURSERY SCHOOLS
POSTDOCTORAL EDUCATION
POSTSECONDARY EDUCATION
PRESCHOOL CHILDREN
PRESCHOOL CURRICULUM
PRESCHOOL EDUCATION
PRIMARY EDUCATION
PROFESSIONAL EDUCATION
SECONDARY EDUCATION
SECONDARY SCHOOL CURRICULUM
SECONDARY SCHOOL STUDENTS
SECONDARY SCHOOLS
SPECIAL DEGREE PROGRAMS
TWO YEAR COLLEGE STUDENTS
TWO YEAR COLLEGES
UNDERGRADUATE STUDENTS
UNDERGRADUATE STUDY
UNIVERSITIES
UPPER DIVISION COLLEGES

FIGURE VII-1: EDUCATIONAL LEVEL DESCRIPTORS — COMPLETE LIST

- **EARLY CHILDHOOD EDUCATION**
  Scope Note: Activities and/or experiences that are intended to effect developmental changes in children, from birth through the primary units of elementary school (grades K-3).
  - **PRESCHOOL EDUCATION**
    Scope Note: Activities and/or experiences that are intended to effect developmental changes in children, from birth to entrance in kindergarten (or grade 1 when kindergarten is not attended).
  - **PRIMARY EDUCATION**
    Scope Note: Education provided in kindergarten through grade 3.
- **ELEMENTARY SECONDARY EDUCATION**
  Scope Note: Formal education provided in kindergarten or grade 1 through grade 12.
  - **ELEMENTARY EDUCATION**
    Scope Note: Education provided in kindergarten or grade 1 through grade 6, 7, or 8.
    - **ADULT BASIC EDUCATION**
      Scope Note: Education provided for adults at the elementary level (through grade 8), usually with emphasis on communicative, computational, and social skills.
    - **PRIMARY EDUCATION**
      Scope Note: (See above.)
    - **INTERMEDIATE GRADES**
      Scope Note: Includes the middle and/or upper elementary grades, but usually 4, 5, and 6.
  - **SECONDARY EDUCATION**
    Scope Note: Education provided in grade 7, 8, or 9 through grade 12.
    - **JUNIOR HIGH SCHOOLS**
      Scope Note: Providing formal education in grades 7, 8, and 9 -- less commonly 7 and 8, or 8 and 9.
    - **HIGH SCHOOLS** *(Changed from "Senior High Schools" in March 1980.)*
      Scope Note: Providing formal education in grades 9 or 10 through 12.
    - **HIGH SCHOOL EQUIVALENCY PROGRAMS**
      Scope Note: Adult educational activities concerned with the preparation for and the taking of tests which lead to a high school equivalency certificate, e.g., General Educational Development program.
- **POSTSECONDARY EDUCATION**
  Scope Note: All education beyond the secondary level -- includes learning activities and experiences beyond the compulsory school attendance age, with the exception of adult basic education and high school equivalency programs. (Before APR75, restricted to "education beyond grade 12 and less than the baccalaureate level.")
  - **HIGHER EDUCATION**
    Scope Note: All education beyond the secondary level leading to a formal degree.
  - **TWO YEAR COLLEGES** *(Changed from "Junior Colleges" in March 1980.)*
    Scope Note: Public or private postsecondary institutions providing at least 2, but less than 4, years of academic and/or occupational education.

FIGURE VII-2: MANDATORY "EDUCATIONAL LEVEL" DESCRIPTORS

(Procedure implemented February 1975)

Other Descriptors, which may be similar in form and meaning to any of the 14 broad level Descriptors, should not be used as educational level Descriptors per se. They may, however, be used for other indexing applications. For example:

Mandatory Terms for Indexing Educational Level	Closely Related Terms
PRESCHOOL EDUCATION	PRESCHOOL CURRICULUM
ELEMENTARY EDUCATION	ELEMENTARY SCHOOLS
JUNIOR HIGH SCHOOLS	JUNIOR HIGH SCHOOL STUDENTS

Chronological age may often be used in determining the educational level of a population group. For instance, if 5-9 year olds represent the target population of a study, the indexer can assume (unless the document or article describing the study indicates otherwise) that the educational level is "grades K-3" or PRIMARY EDUCATION.

NOTE-- There are cases where grade and age level correspondence would not hold true:

- mentally handicapped persons whose chronological ages and mental ages do not match.
- gifted persons whose mental age is above their normal age-grade placement.
- persons of compulsory school age who have been excused from attending school.

Hopefully, the educational level of these groups would be specified in the document or article because the indexer could not assume educational level strictly on the basis of age level. In most instances, however, age level may be used to determine educational level. (See conversion list displayed in **Figure VII-3.**)

Grade-level ranges may also, like age, be used to determine the appropriate educational level Descriptor to use. (See **Figure VII-4.**)

The indexer should not confuse the intermediate or middle grades with the so-called "middle school level." The concept "middle school" has never been standardized and should not be used as an educational level term. Usually thought of as a replacement for the junior high school level, the most commonly agreed-upon "middle-school" grade-level ranges are:

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CHRONOLOGICAL AGE	CORRESPONDING BROAD EDUCATIONAL LEVEL DESCRIPTOR
0-9	EARLY CHILDHOOD EDUCATION
0-5,6	PRESCHOOL EDUCATION
5-9	PRIMARY EDUCATION
5-12,13,14	ELEMENTARY EDUCATION
5-18	ELEMENTARY SECONDARY EDUCATION
9-12,13,14	INTERMEDIATE GRADES
12,13,14-18	SECONDARY EDUCATION
12-15	JUNIOR HIGH SCHOOLS
14,15-18	HIGH SCHOOLS
Adult	ADULT BASIC EDUCATION
Adult	HIGH SCHOOL EQUIVALENCY PROGRAMS
Adult	POSTSECONDARY EDUCATION
Adult	HIGHER EDUCATION
Adult	TWO YEAR COLLEGES

FIGURE VII-3

CHRONOLOGICAL AGE TO EDUCATIONAL LEVEL CROSS-REFERENCE TABLE

GRADE LEVEL	CORRESPONDING BROAD EDUCATIONAL LEVEL DESCRIPTOR
K-12	ELEMENTARY SECONDARY EDUCATION
K-8, 1-6, 1-8	ELEMENTARY EDUCATION
1-3	PRIMARY EDUCATION
4-6, 5-8	INTERMEDIATE GRADES
6-8, 7-8, 7-9, 7-10	JUNIOR HIGH SCHOOLS
9-12, 10-12	HIGH SCHOOLS
*13-14, 14-16, 15-16	HIGHER EDUCATION

*When appropriate, use TWO YEAR COLLEGES for grade level range 13-14.

FIGURE VII-4

GRADE LEVEL TO EDUCATIONAL LEVEL CROSS-REFERENCE TABLE

- 7-8 and
- 6-8,

but other possible ranges include:

- 4-7,
- 5-8,
- 6-9, and
- 7-9.

Thus, the Descriptor MIDDLE SCHOOLS should be used as an index term only when the document or article itself uses it, and only with an appropriate educational level Descriptor.

It is worth noting that the term ADULT EDUCATION was not included in the list of broad educational level Descriptors precisely because it does not discriminate this factor; it may overlap the elementary (adult basic), secondary (high school equivalency), and postsecondary levels. Documents on "lifelong" and/or "adult" education (excluding the educational leveler ADULT BASIC EDUCATION) do not necessarily require an educational level Descriptor. It is assumed that such documents would be indexed by LIFELONG LEARNING, ADULT EDUCATION, or a narrower term in the ADULT EDUCATION hierarchy.

The following examples are intended to show some typical situations that the indexer might face in indexing by educational level...

- EXAMPLE 1:

A document on *Enrollment Patterns at Prince George's Community College* might be indexed:

DESCRIPTORS: ASSOCIATE DEGREES; *COMMUNITY COLLEGES; ENROLLMENT, ENROLLMENT RATE; *ENROLLMENT TRENDS; TWO YEAR COLLEGES; *TWO YEAR COLLEGE STUDENTS; etc.

IDENTIFIERS: PRINCE GEORGES COMMUNITY COLLEGE MD; etc.

Prince George's Community College is a 2-year institution with terminal occupational and bachelor's creditable programs. COMMUNITY COLLEGES should be included as a major Descriptor because of its specificity, but accompanied by the leveling term TWO YEAR COLLEGES as a minor entry.

- EXAMPLE 2:

A document on *Teaching About Africa—Social Studies Activities for Seventh Graders* might be indexed:

DESCRIPTORS: *AFRICAN CULTURE; *GRADE 7; JUNIOR HIGH SCHOOLS; *SOCIAL STUDIES; TEACHING METHODS; UNITS OF STUDY; etc.

IDENTIFIERS: *AFRICA; etc.

The leveling term JUNIOR HIGH SCHOOLS is added as a minor Descriptor complementing the major and more specific Descriptor GRADE 7. Although overlapping between the general concepts of ELEMENTARY EDUCATION and SECONDARY EDUCATION, GRADE 7 (also GRADE 8) would normally be used with JUNIOR HIGH SCHOOLS, unless such indexing would mislead users.

- EXAMPLE 3:

An article on *Evaluation of Arithmetic Units in Grades 3, 5, and 7* might be indexed:

> DESCRIPTORS: *ARITHMETIC; *CURRICULUM EVALUATION; ELEMENTARY EDUCATION; *ELEMENTARY SCHOOL MATHEMATICS; GRADE 3; GRADE 5; GRADE 7; etc.

Although ELEMENTARY EDUCATION is included as the leveling term, ELEMENTARY SCHOOL MATHEMATICS is asterisked (made Major) because of its specificity. The specific grade terms are added as an indexing option; in this case, they are not asterisked, as the author of the article indicates general transferability of his conclusions to arithmetic units in grades 4 and 6.

- EXAMPLE 4:

A document on *Differential Diagnostic Evaluations of Aurally Disabled Children in Grades K-6, With Emphasis on Kindergarten Children to Allow Major Corrective Measures Prior to Entry into First Grade* might be indexed:

> DESCRIPTORS: *AUDITORY EVALUATION; DIAGNOSTIC TESTS; ELEMENTARY EDUCATION; *ELEMENTARY SCHOOL STUDENTS; *HEARING IMPAIRMENTS; KINDERGARTEN CHILDREN; etc.

ELEMENTARY EDUCATION is the leveling term corresponding to grades K-6. ELEMENTARY SCHOOL STUDENTS is starred (made Major) because of its specificity. KINDERGARTEN CHILDREN is included as a minor term because of the particular emphasis at this level.

- EXAMPLE 5:

An article on *New Curricula for Preparing Educational Administrators—Providing Leadership for the 1990-1995 Public Schools* might be indexed:

> DESCRIPTORS: *ADMINISTRATOR EDUCATION; *CURRICULUM DEVELOPMENT; *EDUCATIONAL ADMINISTRATION; EDUCATIONAL NEEDS; ELEMENTARY SECONDARY EDUCATION; HIGHER EDUCATION; PUBLIC SCHOOLS; etc.

Two leveling terms, HIGHER EDUCATION and ELEMENTARY SECONDARY EDUCATION, are used. The former covers the level of training discussed in the article; the latter covers the educational level of the ultimate target group.

- EXAMPLE 6:

A document on *Preparing Teachers, Students, and Citizens to Deal with the Problems and Potentialities of the Aged* might be indexed:

> DESCRIPTORS: *GERONTOLOGY; POSTSECONDARY EDUCATION; etc.

POSTSECONDARY EDUCATION sufficiently covers the educational level here. HIGHER EDUCATION would not be indexed unless the document covered training programs leading to a formal degree. ADULT EDUCATION is too broad and, therefore, not used.

Note the absence of the Descriptor OLDER ADULTS. The post-coordination of OLDER ADULTS and POSTSECONDARY EDUCATION would most likely be used for education *for*, rather than *about*, older adults, in which case, this document would be a false drop.

- EXAMPLE 7:

A document on *Establishing a Language Laboratory to Teach English to Non-English Speaking, Inner City Youth to Help to Overcome Linguistic and Cultural Handicaps* might be indexed:

> DESCRIPTORS: *DISADVANTAGED YOUTH; *ENGLISH (SECOND LANGUAGE); *LANGUAGE LABORATORIES; *NON ENGLISH SPEAKING; SECOND LANGUAGE INSTRUCTION; etc.

Though designation of educational level might be applicable in this case, none could be indexed without further information.

- EXAMPLE 8:

An article on *The Influence of Teachers on Religious Beliefs and Moral Values* might be indexed:

> DESCRIPTORS: EDUCATIONAL OBJECTIVES; *MORAL VALUES; *RELIGION; RELIGIOUS EDUCATION; TEACHER ATTITUDES; *TEACHER INFLUENCE; *TEACHER STUDENT RELATIONSHIP; etc.

Educational level does not appear to be applicable in this case. The material appears to be open to all levels.

- EXAMPLE 9:

An article on *Government and Academia: The Federal Government's Increasing Role in Higher Education* might be indexed:

> DESCRIPTORS: ACADEMIC FREEDOM; COMPLIANCE (LEGAL); *FEDERAL REGULATION; GOVERNMENT ROLE; *GOVERNMENT SCHOOL RELATIONSHIP; *HIGHER EDUCATION; INSTITUTIONAL AUTONOMY; etc.

Here, unlike any of the preceding examples, the educational leveler is made a major Descriptor. HIGHER EDUCATION, in consideration of other related Descriptors, provides adequate precision in regard to this article's subject.

★See additional examples and reminders regarding the mandatory education levelers under "Leveling" in the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* [Appendix C].

(3) **Age Level**

The fifteen (15) Descriptors listed in **Figure VII-5** are used to index age level in the ERIC system. Each covers a specific age range. One or more of these Descriptors should be posted to ERIC documents or journal articles concerned strictly with age-level groups or populations. However, note that the use of specific terms in indexing such as ADOPTED CHILDREN and ADULT DROPOUTS obviates the need to also index generic age levelers such as CHILDREN and ADULTS.

Unlike educational levelers, age-level Descriptors are not to be considered "mandatory." Appropriate mandatory educational levelers must always be considered first and be given precedence over age levelers. For instance, a document properly indexed with EARLY CHILDHOOD EDUCATION (mandatory educational leveler) would not usually carry the age leveler YOUNG CHILDREN, unless a subset of the total population with which the document is concerned falls outside the scope of early childhood education. (In other words, the use of YOUNG CHILDREN would be appropriate if a part of the subject population is not adequately conveyed by the activities and experiences with which early childhood education is normally concerned.)

AGE LEVEL DESCRIPTORS
(age ranges are approximations)

NEONATES	Aged birth to 1 month.
INFANTS	Aged birth to 24 months.
YOUNG CHILDREN	Aged birth through 8 years.
CHILDREN	Aged birth through 12 years.
TODDLERS	Aged 1 through 3 years.
PRESCHOOL CHILDREN	Aged 2 through 5 years.
PREADOLESCENTS	Aged 9 through 12 years.
ADOLESCENTS	Aged 13 through 17 years.
YOUNG ADULTS	Aged 18 through 30 years.
ADULTS	Aged 18 years and over.
ADULTS (30 TO 45)	Aged between 30 and 45 years.
MIDDLE AGED ADULTS	Aged 45 through 64 years.
YOUNG OLD ADULTS	Aged 65 through 75 years.
OLDER ADULTS	Aged 65 years and over.
OLD OLD ADULTS	Aged 75 years and over.

FIGURE VII-5: "AGE LEVEL" DESCRIPTORS

b. Action Concepts and Materials Concepts

Activities or action concepts include such terms as:

- Instruction;
- Testing;
- Experiments, etc.

Methodology and materials concepts include such terms as:

- Language Laboratories;
- Objective Tests;
- Filmstrips, etc.

Often a decision must be made as to whether the document is about the activity, about the materials, or about both. (In certain instances, the activity and the methodology might be essentially the same.)

For example, if a document is about testing, making only slight mention of methods and specific tests, then it should be indexed by TESTING. However, do not use TESTING when more precise Descriptors are available (MINIMUM COMPETENCY TESTING, TESTING PROGRAMS, etc.).

If it is about the development or use of a specific kind of test (i.e., aptitude tests), then it should be indexed by APTITUDE TESTS, not by TESTING.

If, however, the document is about testing, and various aptitude tests were used, it should be indexed by TESTING (or a more precise "testing" term), by APTITUDE TESTS, and by the names (Identifiers) of the specific aptitude tests for which data and results were presented.

★See additional reminders under "Methodology" in the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* [Appendix C].

c. Curriculum Concepts

This refers to the educational subject or concept that is being administered, taught, or measured. Examples are:

- Arithmetic;
- History;
- Learning Disabilities;
- Reading;
- Spatial Ability, etc.

Those concepts that are actively and substantially treated by the document are indexable. For example, if a teaching method is used for arithmetic and this is reported and described in detail, then the document should be indexed by ARITHMETIC, along with terms describing the method, the persons being taught, etc. However, if the document mentions that this method might also be used for teaching music, but does not describe this use of the method, then the document should not be indexed by MUSIC.

d. Document Form/Type

It is a valid indexing concern to wish to record and store the information describing whether a document is a textbook, curriculum guide, dissertation, or other well-known form. Use of such specific information can often aid retrieval. For example, a search for textbooks on mathematics for adults probably would not wish to retrieve documents dealing with textbook writing. The former can be indexed by TEXTBOOKS; the latter by TEXTBOOK PREPARATION.

Similarly, specific curriculum guides can be distinguished from the act of curriculum preparation by using the Descriptors CURRICULUM GUIDES and CURRICULUM DEVELOPMENT, respectively. Not all situations can be handled in this manner, and it may be necessary to rely on coordination of index terms to distinguish concepts.

From ERIC's beginning in 1966 through mid-1974, the only way to index by document/publication form or type was via Descriptors or Identifiers. In mid-1974 the "Publication Type" data element was added to the ERIC Resume Form, and catalogers began routinely tagging each and every accession with a code representing its form (see **Figure VII-6**).

With the inception of this new cataloging element (which is machine manipulable and can be searched or made to print out with each resume), it becomes necessary to coordinate the assignment of the PUBTYPE code with the assignment of Descriptors that can represent form.

Many Descriptors can be used for tagging publication types. A fairly comprehensive list appears in the cataloging rules pertaining to PUBTYPE and is repeated here as **Figure VII-8**. There are twenty-two (22) Descriptors that are not used for this purpose, however, because such use would essentially duplicate the coding of the PUBTYPE field. Each of these 22 terms carries the following note in the *Thesaurus*: "CORRESPONDS TO PUBTYPE CODE XXX---DO NOT USE EXCEPT AS THE SUBJECT OF A DOCUMENT." These 22 Descriptors and their corresponding PUBTYPE codes are listed in **Figure VII-7**.

All other Descriptors that represent form (e.g., DIARIES) should generally be used in indexing as minor Descriptors. Only when representing the subject of the document in hand should they be used as major Descriptors.

★See additional examples and reminders under "Pubtype" in the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* [Appendix C].

CODE	PUBLICATION/DOCUMENT TYPES
010	BOOKS
	COLLECTED WORKS
020	---General
021	---Conference Proceedings
022	---Serials
030	CREATIVE WORKS (Literature, Drama, Fine Arts)
	DISSERTATIONS/THESES
040	---Undetermined
041	---Doctoral Dissertations
042	---Masters Theses
043	---Practicum Papers
	GUIDES
050	---General (use more specific code, if possible)
	---Classroom Use
051	---Instructional Materials (For Learner)
052	---Teaching Guides (For Teacher)
055	---Non-Classroom Use (For Administrative and Support Staff, and for Teachers, Parents, Clergy, Researchers, Counselors, etc., in Non-Classroom Situations)
060	HISTORICAL MATERIALS
070	INFORMATION ANALYSES (State-of-the-Art Papers, Research Summaries, Reviews of Literature on a Topic)
071	---ERIC Information Analysis Products (IAPs)
072	---Book/Product Reviews
073	---ERIC Digests (Selected) in Full Text
080	JOURNAL ARTICLES
090	LEGAL/LEGISLATIVE/REGULATORY MATERIALS
100	AUDIOVISUAL/NONPRINT MATERIALS
101	---Computer Programs
102	---Machine-Readable Data Files (MRDFs)
110	STATISTICAL DATA (Numerical, Quantitative, etc.)
120	VIEWPOINTS (Opinion Papers, Position Papers, Essays, etc.)
	REFERENCE MATERIALS
130	---General (use more specific code, if possible)
131	---Bibliographies/Annotated Bibliographies
132	---Directories/Catalogs
133	---Geographic Materials/Maps
134	---Vocabularies/Classifications/Dictionaries
	REPORTS
140	---General (use more specific code, if possible)
141	---Descriptive (i.e., Project Descriptions)
142	---Evaluative/Feasibility
143	---Research/Technical
150	SPEECHES, CONFERENCE PAPERS
160	TESTS, EVALUATION INSTRUMENTS
170	TRANSLATIONS
171	---Multilingual/Bilingual Materials

FIGURE VII-6:

PUBLICATION/DOCUMENT TYPES

DESCRIPTORS CORRESPONDING TO PUBLICATION TYPE CATEGORIES

DESCRIPTOR	PUBTYPE CODE
AUDIOVISUAL AIDS	100
BIBLIOGRAPHIES	131
BOOKS	010
COMPUTER SOFTWARE	101
CONFERENCE PAPERS	150
CONFERENCE PROCEEDINGS	021
DICTIONARIES	134
DIRECTORIES	132
DOCTORAL DISSERTATIONS	041
GUIDES	050
MASTERS THESES	042
MULTILINGUAL MATERIALS	171
PRACTICUM PAPERS	043
REFERENCE MATERIALS	130
REPORTS	140
RESEARCH REPORTS	143
SERIALS	022
SPEECHES	150
STATISTICAL DATA	110
TESTS	160
THESES	040
VOCABULARY	134

FIGURE VII-7:

DESCRIPTORS CORRESPONDING TO PUBLICATION TYPE CATEGORIES

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Abstracts	131
Administrator Guides	055
Annotated Bibliographies	131
Annual Reports	141
Answer Keys	160
Answer Sheets	160
Anthologies	020
[Archival Documents]	060
Atlases	133
Audiodisks	100
Audiotape Recordings	100
★Audiovisual Aids	100
Autobiographies	060
★Bibliographies	131
[Bilingual Materials]	171
Biographical Inventories	060 (132)
Biographies	060
[Booklists]	131
★Books	010
Book Reviews	072
Bulletins	022
[Bylaws]	090
Cartoons	100 (030)
Case Records [or] Case Studies	141 or 143 or 140
Catalogs	132
Charts	100
Check Lists	130 or 160
[Childrens Books]	010 and 030
Childrens Literature	030 (010)
Chronicles	060 (020)
Citation Indexes	131
[Class Newspapers]	022
[Classroom Games]	051 (100)
[Classroom Materials]	051 or 052
Codes of Ethics	090
Comics (Publications)	030
Computer Output Microfilm	100
★Computer Software	101
Computer Software Reviews	072 (142)
[Concordances]	134
★Conference Papers	150
★Conference Proceedings	021

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
[Conference Summaries]	021
Contracts	090
Course Descriptions	052 or 050 or 051
[Courtroom Transcripts]	090
[Creative Works]	030
Curriculum Guides	052 or 050 or 051
[Data Sheets]	110 or 130
Databases	102
Diagrams	100
Diaries	120 (060 or 030)
★Dictionaries	134
[Dictionary Catalogs]	131
★Directories	132
[Discipline Codes]	090
Discographies	131
★Doctoral Dissertations	041
Documentaries	100 (141)
Drama	030
Editorials	120
Encyclopedias	130
[ERIC Digests in Full Text]	073
[ERIC IAPs]	071
Essays	120 or 030
[Evaluation Studies]	142
Facility Guidelines	055
Faculty Handbooks	055
Feasibility Studies	142
Filmographies	131
Films	100
Filmstrips	100
Flow Charts	100
Foreign Language Books	010 (170)
Foreign Language Films	100 (170)
Foreign Language Periodicals	022 (170)
Games	030 or 100
Glossaries	134
Graphs	100
Guidelines	050 or 052 or 055
★Guides	050 or 051 or 052 or 055

FOOTNOTES:

1. All terms not in brackets have been selected from the ERIC *Thesaurus*.
2. Conventions
   A or B = one or the other category is appropriate, depending on item.
   A and B = two categories are appropriate.
   A (B) = a second category might be appropriate, depending on item.
   ★ = category and term are synonymous. Term should be used in Descriptor field only when it denotes subject matter.
3. These terms, like all other Descriptors identifying the form or type of a document, should be used as major Descriptors only when they represent the subject of the document in hand.

FIGURE VII-8: GUIDE FOR ASSIGNING PUBTYPE CODES (A CROSS-REFERENCE FROM SPECIFIC KINDS OF DOCUMENTS TO MOST APPLICABLE PUBLICATION TYPE CODE)

Page 1 of 3

[Bracketed terms are not Descriptors]

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Hearings	090
[Historical Reviews]	060
Illustrations	100
Indexes	130 or 131
[Information Analyses]	070 or 071
Instructional Materials	051
Interviews	120 or 160
Item Banks	160
[Journal Articles]	080
[Journals]	022
[Judicial Materials]	090
Kinescope Recordings	100
Laboratory Manuals	051
[Language Guides]	051 or 030 (170)
Large Type Materials	051
Leaders Guides	052
[Lecture]	150 (051)
[Legal Analysis]	090
Legislation	090
Lesson Plans	052
Letters (Correspondence)	030
[Literature Guides]	131
Literature Reviews	131 (070)
[Lobbying Papers]	090 and 120
Magnetic Tape Cassettes	100
Magnetic Tapes	100
[Manuals]	050 or 051 or 052 or 055
Maps	133
Master Plans	090
[Master Tapes (Audio)]	100
★Masters Theses	042
Matrices	100
Microforms	100
Models	100 or 143
★Multilingual Materials	171
[Musical Materials]	030
Negotiation Agreements	090
Newsletters	022
Newspapers	022
Nonprint Media	100
Opinions	120
[Oral History Transcripts]	060

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Pamphlets	Document Dependent
[Parent Guides]	055
Patents	090
Periodicals	022
Permuted Indexes	130 or 131
Personal Narratives	060 or 120
[Phonograph Records]	100
Photographs	100
Poetry	030
Position Papers	120
★Practicum Papers	043
Program Descriptions	141
Program Evaluation	142
Program Guides	141
Program Proposals	141
[Programed Texts]	010 and 051
Puzzles	030 or 100
Questionnaires	160
Rating Scales	160
[Recommendations]	120
Records (Forms)	Document Dependent
★Reference Materials	130 (010)
[Regulations]	090
★Reports	140
[Research Methodology Guides]	055
Research Proposals	143
★Research Reports	143
[Research Reviews (Publications)]	070
Resource Materials	050 or 051 or 052 or 055
Scholarly Journals	022
School Newspapers	022
School Publications	Document Dependent
Scripts	030
★Serials	022
Short Stories	030
Slides	100
Specifications	090
★Speeches	150
Standards	090
State of the Art Reviews	070
★Statistical Data	110
Student Journals	120 (030)
Student Publications	Document Dependent
Study Guides	051

FIGURE VII-8: GUIDE FOR ASSIGNING PUBTYPE CODES (A CROSS-REFERENCE FROM SPECIFIC KINDS OF DOCUMENTS TO MOST APPLICABLE PUBLICATION TYPE CODE)

Page 2 of 3
(see explanatory footnotes on first page)

[Bracketed terms are not Descriptors]

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Surveys	160 or 143
Tables (Data)	110
Talking Books	100
Tape Recordings	100
[Taxonomy]	134
Teaching Guides	052
[Technical Reports]	143
Test Reviews	072 (142)
★Tests	160
Textbooks	010 and 051
Thesauri	134
★Theses	040

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
[Transcripts (Interview)]	120
[Transcripts (Legal)]	090
[Transcripts (Oral History)]	060
Videodisks	100
Videotape Recordings	100
★Vocabulary	134
Word Lists	134
Workbooks	051
Worksheets	051
Yearbooks	141 (022)

FIGURE VII-8: **GUIDE FOR ASSIGNING PUBTYPE CODES (A CROSS-REFERENCE FROM SPECIFIC KINDS OF DOCUMENTS TO MOST APPLICABLE PUBLICATION TYPE CODE)**

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(see explanatory footnotes on first page)

[Bracketed terms are not Descriptors]

* * *

e. Identifiers

Frequently a part of a document's indexable information are:

- proper names of persons;
- geographic locations;
- proper names of organizations;
- projects, etc.

These highly specific terms (varied and often transient) usually are not appropriate for the *Thesaurus*. Nevertheless, they can be highly useful access points for the users and must be taken into account in the indexing process. The ERIC solution to this problem is to create a relatively "free" and open subject indexing field called the Identifier field.

Identifiers are not rigidly defined, structured, or controlled as are Descriptors; however, in order to avoid excessive scattering under different word forms, and to aid retrieval, certain standards are observed in their construction.

The *Identifier Authority List* (IAL) should be consulted to determine the proper format for all existing Identifier concepts. The various categories of Identifiers and the rules for the construction of new Identifiers are covered in detail in Section VIII (Part 2). The existing categories of Identifiers are:

- Conferences/Meetings;
- Curriculum Areas;
- Equipment
  (including Computer Programs);
- Facilities;
- Geographic Locations;
- Groups (Ethnic);
- Groups (Occupations);
- Groups (Other);
- Health-Related Terms
  (including Psychology);
- Historical/Special Events;
- Languages/Linguistics;
- Laws/Legislation;
- Methods/Theories;
- Miscellaneous;
- Organizations;
- Personal Names;
- Projects/Programs;
- Science & Technology;
- Tests/Testing;
- Titles (Literature,
  Films, etc.)

In addition to specific entities, Identifiers may consist of more general concepts that have been introduced in the ERIC literature but not yet added to the *Thesaurus. Candidate Descriptors, awaiting approval for admission to the Thesaurus are always "posted" in the ERIC system as Identifiers.*

Selection of Identifiers should be made on the same basis as selection of Descriptors. The Identifier should be considered indexable information if the document contains significant and substantial enough information on the Identifier, *as a subject*, to justify later retrieval. To provide some examples:

- A document on investigations of chaos (nonlinear systems) theory relative to educational phenomena might not be concerned *per se* with the theory itself. However, the inclusion of CHAOS THEORY as an Identifier would undoubtedly be justified because of the interest of researchers in isolating the various applications of the theory.

- A statistical study that happened to run its data on IBM PC compatible computers should not necessarily be indexed by the Identifier IBM PC COMPATIBLES insofar as the type of computer system used may be completely incidental to the study results.

- A paper dealing with unemployment among female teachers in New England should be indexed by the geographic Identifier NEW ENGLAND. New England is not the main topic *per se*, but the area of a country inhabited by subjects of a study can be crucial to the meaning and usage of the document and the results reported.

- A history, or a report of current activities, of the National Science Foundation should be indexed by the Identifier NATIONAL SCIENCE FOUNDATION, even if the report is published by the agency and it appears as the institutional source. The former indexing indicates subject matter; the latter indicates the responsible preparing body. These are two different involvements.

Identifiers appear in the Document Description (Resume) section of *Resources in Education* and in the Main Entry section of *Current Index to Journals in Education*, and those that are asterisked as Major terms appear in the printed subject indexes. There is no minimum requirement for Identifiers. No more than two major Identifiers may be designated when there are five or fewer major Descriptors; only one major Identifier is permitted if there are six (the maximum) major Descriptors.

> ★See additional examples and reminders under "Identifiers" in the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* [Appendix C].

f. Target Audience

Although target or intended audience is *not* a document "subject," the recognition of audience is a necessary ingredient of the subject indexing process (whose most basic tenet is relevance to the user). ERIC indexes or catalogs Target Audience in a separate data element or field (separate from the Descriptors and Identifiers). *The field is used when an author clearly specifies an intended audience (approximately 25% of current ERIC input); otherwise, it is left blank.*

ERIC defines eleven distinct audience groups, which are listed in **Figure VII-9**. The ERIC computer system automatically adds the generic audience "Practitioners" to records cataloged by any of the five "practitioner" sub-categories. Several audiences from the prescribed list in **Figure VII-9** may be cataloged for individual records, within an overall 80-character field length; however, if more than two practitioner groups are identified, only the generic "Practitioners" should be cataloged.

Target Audience became a fully defined cataloging element for RIE in January 1984 and for CIJE in September 1984. There are some retrospective RIE postings of "Practitioners" and "Students."

Target Audience is used in computer searching as a precise "limiter." Its presence in a record assumes restrictiveness and exclusion of relevance for groups not present. Target Audience does not appear in the printed RIE and CIJE abstract journals.

> ★For the complete discussion of Target Audience, see Section V under the data element "Audience"; see also additional reminders under "Target Audience" in the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* [Appendix C].

4. Translation and Negotiation (Indexable Concepts into Approved Terminology)

a. Use of an Exact Equivalent, Synonym, Broader Term, Narrower Term, or Two Terms Coordinated

The concepts that have been listed (in the author's or indexer's terminology) as possible Descriptors must be translated into the language of the *Thesaurus*. Each concept must be compared with terms in the *Thesaurus* to determine:

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TARGET AUDIENCE

Educational documents and journal articles are sometimes written for particular audiences. ERIC currently identifies these audiences in a special "Target Audience" field (data element). The field is used when an author clearly specifies an intended audience; otherwise, it is left blank. For consistency, eleven (11) distinct audiences have been defined by ERIC, as follows:

- **Policymakers**
- **Researchers**
- **Practitioners***
    - **Administrators**
    - **Teachers**
    - **Counselors**
    - **Media Staff**
    - **Support Staff**
- **Students**
- **Parents**
- **Community**

**Note: The ERIC computer system automatically adds the generic audience "Practitioners" to records cataloged by any of the five "practitioner" sub-categories.*

FIGURE VII-9: "TARGET AUDIENCE" GROUPS

- whether an exact equivalent exists;
- whether a synonym (or near synonym) exists;
- whether a Broader Term in the *Thesaurus* is adequate for retrieval of the concept;
- whether two or more different existing terms in the *Thesaurus* can be coordinated for retrieval of the concept;
- whether it is an existing Identifier; or
- whether it is necessary to introduce a new term to the Identifier field in order to cover the concept.

As the indexer attempts to locate applicable terms, the latest editions of the *Thesaurus* and *Identifier Authority List* (Alphabetical Displays) should be used, together with any supplements issued by the Facility since the last editions. The supplementary rotated and hierarchical *Thesaurus* displays and the IAL category display, described in Section VII.H.1-2 on "Indexing Tools," should be used as needed, but not in lieu of the main Alphabetical Displays.

Application of the translation process can best be shown through the use of examples. Let us say that a document reports *"Research on the influences of various factors on the sex role development of 3-to-5-year old preschool children enrolled in a preschool program."* Factors examined were:

- personal traits of the preschoolers (and of their brothers and sisters);
- the "only" child situation;
- intelligence;
- attitudes of parents;
- socioeconomic status;
- type of preschool program; and
- the influence of classmates.

A test to measure each child's intelligence was administered. Several sex role tests were also administered to each child, and two of these, the Draw-a-Person Test and the Toy Preference Test, were discussed in detail and partially reproduced in the document. Procedures surrounding administration of the tests are discussed.

Indexable concepts of the document described seem to be as follows:

PRESCHOOL PROGRAMS
PRESCHOOLERS
SEX ROLE
BROTHERS AND SISTERS
ONLY CHILD
INFLUENCE OF CLASSMATES
ATTITUDES OF PARENTS
PERSONAL TRAITS
SOCIOECONOMIC STATUS
INTELLIGENCE
SEX ROLE TESTS
TEST ADMINISTRATION
DRAW-A-PERSON TEST
TOY PREFERENCE TEST

Taking these terms one at a time:

- ERIC indexers are counseled to index educational level first, and since PRESCHOOL EDUCATION is one of the 14 mandatory educational-level Descriptors, it makes sense to start with the terms beginning with "Preschool..." The children in the study are identified as being enrolled in a preschool program, which is in turn one of the factors studied. "Preschool Programs" is no longer a *Thesaurus* term, but is listed in the *Thesaurus* with the note "Use PRESCHOOL EDUCATION." PRESCHOOL EDUCATION is chosen, therefore, as the initial indexing term for this document.

- Preschoolers are the subjects of the study. The concept "preschoolers" is listed in the *Thesaurus* with the instruction "Use PRESCHOOL CHILDREN." Look at the full display for that term. The Scope Note defines PRESCHOOL CHILDREN as "aged 2 through 5 years." PRESCHOOL CHILDREN can therefore be used to identify the population studied. In this case, USE A SYNONYM OR NEAR SYNONYM. This is in addition to the education-leveler PRESCHOOL EDUCATION, already selected to identify one of the factors studied.

- "Sex Role" appears as a term in the *Thesaurus*, so here USE THE EXACT EQUIVALENT, i.e., SEX ROLE.

- "Brothers and Sisters" are two concepts, and both appear in the *Thesaurus* with the instruction "Use SIBLINGS." Here again, USE A SYNONYM OR NEAR SYNONYM. There are no other appropriate terms in the display for SIBLINGS because they are either too narrow (TWINS) or not mentioned in the study (BIRTH ORDER).

- "Only Child" is not a *Thesaurus* term. Looking under "One Child Family," "Single Child," and "Single Child Family" meets with no success. Since there seems no way to express this concept with existing *Thesaurus* terms, the *Identifier Authority List* (IAL) is consulted. The preferred IAL format is "Only Children"; therefore, USE IT AS AN IDENTIFIER. Make a note of the circumstances for using the concept, because it could become a candidate for a new *Thesaurus* term.

- "Classmates" is not a *Thesaurus* term. The term PEER INFLUENCE is listed in the Rotated Display under "Influence" or "Influences." This seems to get at the concept adequately, so USE A SYNONYM OR NEAR SYNONYM.

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- "Attitudes of Parents" is not a *Thesaurus* term. A note under ATTITUDES in the *Thesaurus* recommends using a more specific term, if possible. PARENT ATTITUDES (found in the NTs) is the exact term needed. In this case, the BROADER TERM IN THE *THESAURUS* IS NOT ADEQUATE FOR RETRIEVAL, for although PARENTS and ATTITUDES could be post-coordinated, ATTITUDES could also be post-coordinated with any other population term such as SIBLINGS. Therefore, the precoordinated term PARENT ATTITUDES is preferable because it is more precise.

- "Personal Traits" does not appear in the *Thesaurus*, but PERSONALITY TRAITS does. The Scope Note seems to cover the concept expressed in the document. Look at INDIVIDUAL CHARACTERISTICS, which is mentioned in the Scope Note. INDIVIDUAL CHARACTERISTICS is scoped to include physical as well as psychological characteristics. PERSONALITY TRAITS is preferable because it is the more precise term. USE A SYNONYM OR NEAR SYNONYM in this case.

- "Socioeconomic Status" is another example of a concept with an EXACT EQUIVALENT in the *Thesaurus*.

- "Intelligence" is also a *Thesaurus* term. However, the terms INTELLIGENCE QUOTIENT and INTELLIGENCE TESTS are listed in the RT display, and the possibility exists that INTELLIGENCE is too broad. Since the document did not state that the test resulted in an intelligence quotient for each child, however, and since the test itself was not discussed in any detail, INTELLIGENCE, the BROADER TERM, IS PREFERABLE.

- "Sex Role Tests" is not a *Thesaurus* term. SEX ROLE alone is a valid Descriptor that was chosen previously in this exercise. It is possible, then, that either TESTS and TESTING could be post-coordinated with SEX ROLE. All three terms could be used for these reasons: TESTS because the tests are discussed in some detail and portions are reproduced in the document; and TESTING because the next concept on our list is "Test Administration," which is cross-referenced "Use TESTING." Thus TWO OR MORE TERMS ALREADY IN THE *THESAURUS* CAN BE COORDINATED FOR RETRIEVAL. However, because TESTS and TESTING are very broad terms (of little value in manual indexes and prone to cause "false drops" in computer searching), the *Thesaurus* is checked further for an appropriate narrower term (NT). The hierarchies of both TESTS and TESTING show a variety of possibilities, but PSYCHOLOGICAL TESTING appears to be the most appropriate concept as it is scoped broadly and is "used for" PSYCHOLOGICAL TESTS. Thus, ONE PRECOORDINATED NARROWER TERM IS CHOSEN TO REPLACE THE TWO BROAD UNITERMS SELECTED ORIGINALLY.

- Since the "Draw-a-Person Test" and "Toy Preference Test" are featured in the document, these terms merit inclusion in the indexing. Since proper test names are not *Thesaurus* terms, look in the IAL to see if they are there to avoid creating variant forms of the names. DRAW A PERSON TEST is there (no hyphens or other special characters permitted in Identifiers except left and right parentheses); it can be used "as is." TOY PREFERENCE TEST is not there. Since its form meets the guidelines for new Identifiers, create a new Identifier. Both of these test names are thus indexed as Identifiers.

Therefore, the following terms have been chosen in the exercise:

Descriptors: Intelligence; Parent Attitudes; Peer Influence; Personality Traits; Preschool Children; Preschool Education; Psychological Testing; Sex Role; Siblings; Socioeconomic Status

Identifiers: Draw a Person Test; Only Children; Toy Preference Test

b. Use of a New Descriptor/Identifier

All new indexing terms, neither found in the *Thesaurus* nor the *Identifier Authority List*, should be posted as Identifiers. Procedures for the construction of new Identifiers are included in Section VIII, Part 2 of this Manual. All Identifiers are reviewed for proper format prior to release to the ERIC master files; RIE Identifiers are reviewed by the ERIC Facility lexicographic staff, while those indexed for CIJE are reviewed by the CIJE Publisher's editorial staff. Most Identifiers, particularly general conceptual-type terms, that accumulate significant postings in the ERIC database should be considered for Descriptor status and inclusion in the *Thesaurus*. (Identifiers not considered eligible for Descriptor status are usually highly specific proper nouns and noun phrases such as geographic locations, organization names, persons, projects, and test titles.)

When the indexer arrives at the decision that a new Descriptor will be recommended, it is then necessary to:

- research the term;
- locate authorities that can be cited as to its meaning and use;
- develop a definition or Scope Note;
- detect synonyms in whose place the new term will be used;
- place the term somewhere in the hierarchy of existing terms, identifying some terms as Broader (higher in the generic tree), some terms as Narrower (lower in the generic tree), and some as Related (on adjacent branches).

The resultant recommendation is transmitted to the ERIC Facility Lexicographer who provides lexicographic coordination and analysis via the system-wide Vocabulary Review Group (VRG). Candidate Descriptors should be posted as Identifiers until the VRG evaluation has been completed and final dispositions are announced. New Descriptor coordination procedures are fully described in Section VIII, Part 1 of this Manual.

5. **Special Issues**
(See also the "Indexing Reminders" section of the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* [Appendix C], for a summary of special issues in ERIC indexing.)

a. **Indexing Specificity**

A fundamental principle of coordinate indexing is to index at the level of specificity of the document in hand. This principle has been referred to earlier; however, enough problems arise in the implementation to warrant a separate discussion.

Some typical examples of "mis-indexed" specificity include:

- Using CURRICULUM GUIDES in lieu of STATE CURRICULUM GUIDES;
- Indexing all "thinking/learning" as COGNITIVE PROCESSES rather than attempting to locate more appropriate narrower terms (e.g., LOGICAL THINKING, LEARNING PROCESSES, PROBLEM SOLVING);
- Forgetting to index the educational leveler HIGH SCHOOLS for "high school education," using the broader leveler SECONDARY EDUCATION instead [mandatory educational levelers (see **Figure VII-2**) are arranged in broader/narrower relationships, not necessarily conforming to the strict genus/species arrangement of BTs/NTs in the *Thesaurus*.]

In each of these instances, the material is being indexed at a higher or more general level than is warranted by the actual content. Users should be able to rely on the reasonable expectation that all materials dealing with a specific subject (e.g., LOGICAL THINKING) can be found under that term or its NTs, and should not be forced to search elsewhere. There are at least three particular situations when an indexer must consider this question of generality/specificity (genus/species) especially carefully. These are:

1. When a document discusses a concept at both a general and specific level, e.g., a document describing objective tests generally, and multiple choice tests specifically, in about equal detail.
2. When a document discusses a specific concept that must be indexed up to a general concept because the latter is the most specific available *Thesaurus* term.
3. When a document discusses many specifics of a general concept, but none in abundant detail.

With reference to (1) above, an indexer might consider, for example, both broader and narrower Descriptors (i.e., OBJECTIVE TESTS and MULTIPLE CHOICE TESTS) as indexable concepts. If there is a sufficient amount of information worth indexing (always a matter of judgment) about both general and specific concepts, then they are both indexed.

In the case of (2) above, for example, a description, study, or review of the well-known Wechsler Adult Intelligence Scale should be indexed by INTELLIGENCE TESTS, as well as by the test name Identifier. The document is, therefore, made available at the level of the most specific available Descriptor (i.e., INTELLIGENCE TESTS, not TESTS) and at the level of the specific test name as well. This guideline requires expertise, knowledge of the system's users, and mature judgment. Further subject specificity may be provided as necessary by Identifiers, but Identifiers should not be used *in lieu of* the most specific available Descriptor. Frequently, specific names that are *new* to the database, or coined terms by *lesser-known* authors, are not indexed, particularly when they are called out in other fields (e.g., title, abstract, descriptive note) and can be retrieved by computer searching of free text.

The third area (3) above, is perhaps the most troublesome. The indexer must develop a "feel" for what is a sufficient or reasonable amount of information about a concept that makes it "indexable." Experience in reviewing search results, as well as in indexing, can be helpful in this area. Some examples may illustrate this problem.

- Example 1:

A document has the Descriptor AGRICULTURAL PERSONNEL. The abstract shows that the population of participants included:

- extension personnel;
- agriculture teachers;
- home economics teachers;
- forestry personnel;
- professional employees in agribusiness.

In the judgment of the indexer, there was insufficient data about the specific occupational groups to merit indexing each one separately. The groups, however, were part of the class "agricultural personnel," and that concept only was indexed. (Parenthetically, mention of the occupational group names in the abstract ensures access to them via free-text computerized retrieval.)

- Example 2:

Describing a population of teachers in a study, the document lists in tables the following:

- age;
- sex;
- educational level attained;
- participation rate of conference attendance.

The indexer must decide whether the information provided is significant enough to index specifically. Since all of the above factors were significant variables in the study, the indexer decided to index the group of concepts at the generic level TEACHER CHARACTERISTICS, as well as specifically with AGE DIFFERENCES, SEX DIFFERENCES, EDUCATIONAL ATTAINMENT, and TEACHER PARTICIPATION.

- Example 3:

A document entitled Guidelines for the *Referral of Children Who Are Suspected or Known to be Exceptional* describes and defines in detail the:

- orthopedically handicapped;
- chronically ill;
- hearing impaired and deaf;
- blind and partially seeing;
- emotionally disturbed;
- socially maladjusted;
- slow learners;
- mentally retarded;
- multiply handicapped;
- gifted.

Because of the considerable detail provided for each category, the indexer decides that this document should be retrievable through the generic concepts EXCEPTIONAL PERSONS and DISABILITIES, as well as through each specific area of exceptionality mentioned above.

- Example 4:

A program guide entitled the *La Grange Area Department of Special Education Handbook* describes a sizable, reputable program that includes education for the:

- mentally retarded;
- physically disabled;
- socially maladjusted;
- emotionally disturbed.

However, nearly all guides for "Special Education" programs include and describe each of these areas. The information on each area of exceptionality is usually similar throughout these guides. Their inclusion in such a guide is implicit and need not be indexed. In contrast to the previous example, the areas of exceptionality covered are not indexable information. The document should be indexed by the concepts PROGRAM GUIDES and SPECIAL EDUCATION, and terms representing its grade level and origin (school district).

b. **Major/Minor Index Terms**
(See also the "Indexing Reminders — Majoring" section of the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* [Appendix C].)

(1) **General**

The ERIC indexer is required to identify the "Major" and most important concepts contained in a document by immediately preceding the equivalent term or terms selected with an asterisk (*). ★*The basic rule to remember is that at least one (1) and not more than five (5) Descriptors (six if only one major Identifier is used) may be designated as Major. No more than two (2) Identifiers may be designated as Major.* All index terms not preceded by an asterisk are automatically considered "Minor" for that document. Any index term may be Major or Minor, depending on the document.

The purpose of this arrangement is to:

- identify the chief or major concepts in the document, thereby providing the ERIC user with additional information and help in the search and evaluation of relevant references on particular subjects.
- provide at least one subject route to the document in the RIE/CIJE printed subject indexes, but not so many as to make the indexes excessively large.
- provide computer searchers the capability of designing either broad, exhaustive searches that aim at comprehensive recall of all references on a subject, or narrower, targeted searches that aim at selective retrieval of some (but perhaps not all) references highly relevant to the subject.

As with the Generality/Specificity guidelines in the immediately preceding section, sufficient problems arise in the implementation of the Major/Minor guidelines to warrant additional discussion and examples.

(2) **Utility of Terms for the Printed Indexes**

Problems occur in this area when the Major terms that emerge are excessively focused, thereby providing insufficient access routes. The ERIC indexer must be aware that the results of the indexing function are used by both manual and computer searchers. This does not mean, however, that the indexer should forget the fundamental rule to "Index to the specific level of subject matter covered by the document." Rather, it means that the indexer, taking full advantage of the *Thesaurus* must consider and provide legitimate access points for both groups of searchers.

Especially for manual searchers (who cannot search on second or third words appearing in a given Descriptor), the major Descriptors assigned should provide as many valid access routes as possible under the circumstances. An example can help make this point. Assume the major terms assigned to a document were: *COLLEGE CURRICULUM; *COLLEGE INSTRUCTION; *COLLEGE SCIENCE; *COLLEGE STUDENTS. The indexer, in reviewing such work, should clearly look for legitimate ways to introduce more "spread" in the indexing. Not only is it likely that more specific terms are appropriate, but without them, the manual user would be at a disadvantage by being limited in retrieval to solely the "College" part of the printed index.

A second type of problem occurs when the major terms assigned are so specialized that all by themselves in the printed indexes they excessively restrict user access points (i.e., the users simply wouldn't think to look under them in many cases). Given a document on heterogeneous and homogeneous grouping within the instructional process, not only should the very specific Descriptors HETEROGENEOUS GROUPING and HOMOGENEOUS GROUPING be "majored," but so should the most specific "instruction" term—in this case GROUP INSTRUCTION. If only the very specialized terms were majored, access would be unnecessarily limited and the manual user would be at a disadvantage.

★*It is important for a specialized Clearinghouse (or any specialist for that matter) not to confuse their own viewpoint and interests with those of all other users. It is prudent, therefore, during the indexing process, to step back at least once and consider the problem of access to a given document by all of its potential users.* Again, the rule of indexing to the specific level of subject matter dealt with by the document must be observed. The guidance here merely suggests that legitimate variegated access routes to a document not be ignored.

(3) Excessively Broad Terms

Excessively broad terms (e.g., DEVELOPMENT), which lack discrimination, and which if used without restraint might collect large numbers of postings in a single journal issue, should be avoided as Majors, just as they should generally be avoided in the indexing process as a whole. Examples of very broad Descriptors that should be used very selectively and only in situations really calling for them are displayed in **Figure VII-10.**

(4) Terms Not Representing Subject Matter

Terms that represent population concepts, educational level, age level, methodology, and document type characteristics can be thought of as not representing the subject matter of the document, at least in the same sense that a clear subject matter term like GEOLOGY does.

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ABILITY
ACHIEVEMENT
ACTIVITIES
ATTITUDES
BACKGROUND
BEHAVIOR
CHANGE
COUNSELING
COURSES
CULTURE
CURRICULUM
DATA
DESIGN
DEVELOPMENT
EDUCATION
EMPLOYMENT
ENVIRONMENT
EQUIPMENT
EVALUATION
FACILITIES
GROUPS
GUIDANCE
GUIDES
IMPROVEMENT
INFLUENCES
INSTITUTIONS
INSTRUCTION
LANGUAGE
LANGUAGES
LEARNING
MEASURES (INDIVIDUALS)
METHODS
NEEDS
OBJECTIVES
OCCUPATIONS
ORGANIZATION
PARTICIPATION
PERFORMANCE
PERSONNEL
PLANNING
PROBLEMS
PROGRAMS
PUBLICATIONS
RELATIONSHIP
REPORTS
RESEARCH
RESOURCES
RESPONSIBILITY
SCHOOLS
SCIENCES
SELECTION
SERVICES
SKILLS
STANDARDS
STATUS
STUDENTS
STUDY
TEACHERS
TESTING
TESTS
THEORIES
THERAPY
TRAINING

FIGURE VII-10: VERY BROAD DESCRIPTORS

Since the applicability of these non-subject terms to a document is generally a yes-no proposition and not a matter of degree, the question arises as to how to handle major-minor indicators vis-a-vis these terms.

Such Descriptors should be made minor in cases where they do no more than identify the intended education level, age level, population, research methodology, type of document, etc. However, such Descriptors may be made Major when they are the topic of significant discussion in the document. In such situations these terms become, in effect, subject terms and should be handled the same way as subject terms, i.e., if the document contains substantial discussion about the concept then the term representing that concept should be made Major no matter what type of term it is.

In order to clarify this point, a number of examples follow:

- **Educational Level**

  A catalog of math concepts and skills for fifth grade math would use GRADE 5 as a major Descriptor and INTERMEDIATE GRADES as a minor Descriptor (the latter indicating mandatory educational level). However, a review of textbooks to determine what math concepts are usually taught in grades 4, 5, or 6 might have INTERMEDIATE GRADES as a major Descriptor (indicating subject content).

- **Population or Age Level**

  A report of a study involving black teenagers (ages 13-18), but that did not discuss the significance of their being black or teenagers would use BLACK YOUTH and ADOLESCENTS as minor Descriptors (indicating population and age level). However, a study entitled *Career Planning by African-American Teenagers* would probably have the same Descriptors as major (indicating significant subject content). The Identifier "African Americans" would be an additional index term (probably major) on the latter document. (NOTE: See discussion of ERIC indexing of variant ethnic names in the "Indexing Reminders — Overindexing" section of the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* [Appendix C].)

- **Methodology**

  A report of a research study that made use of matched groups and included some discussion of the appropriateness of such a technique might use MATCHED GROUPS as a minor Descriptor. On the other hand, a paper on the futility of setting up matched group research designs for a particular type of research should use MATCHED GROUPS as a major Descriptor (representing major subject content).

- **Document Characteristics/Publication Type**
  (See related **Section VII.I.3.d**, "Document Form/Type.")

  A teacher's guide that contains a questionnaire, among other materials, would use QUESTIONNAIRES as a minor Descriptor (representing document characteristics/type) and pubtype code 160. A description of an evaluation project that designed and field tested a questionnaire should use QUESTIONNAIRES as a major Descriptor.

  An auto mechanics curriculum guide containing behavioral objectives, suggested activities, a workbook, and evaluation questions keyed to the objectives might have CURRICULUM GUIDES, BEHAVIORAL OBJECTIVES, LEARNING ACTIVITIES, WORKBOOKS, and CRITERION REFERENCED TESTS as minor Descriptors (document characteristics/publication types). A manual on how to design curriculum guides or how to develop and evaluate behavioral objectives would have CURRICULUM GUIDES or BEHAVIORAL OBJECTIVES as major Descriptors (representing major subject content).

c. Capitalization of Index Terms

The ERIC database is an upper and lower case file and all index terms must be entered into the ERIC records in correct upper and lower case form.

The *Identifier Authority List* (IAL) is printed in upper and lower case and presents no problem in this regard. All the indexer has to do is use the form as printed in the IAL. The indexer will find that the initial letters of every Identifier word, usually excepting certain conjunctions, articles, and prepositions, are in upper case in the IAL.

The ERIC *Thesaurus* "Working Copy" is currently printed in all upper case only and therefore the indexer must remember to convert all Descriptors to initial capital letters only. The ERIC *Thesaurus* "published edition" has a mixed upper and lower case format that, if used for indexing, has to be converted to the preferred ERIC format.

Articles, conjunctions, and prepositions are never capitalized in Descriptors unless they are the first word. There are, however, certain Identifiers where articles, conjunctions, and prepositions are appropriately capitalized, e.g., literary titles such as "Graduate (The)." Some examples appear in **Figure VII-11.**

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	DESCRIPTORS		IDENTIFIERS	
ARTICLES/ CONJUNCTIONS/ PREPOSITIONS	USUAL USAGE (LC) (Example)	EXCEPTION (UC) (Example)	USUAL USAGE (LC) (Example)	EXCEPTION (UC) (Example)
A	Postsecondary Education as a Field of Study	None	Visit to a Small Planet	A Better Chance Inc
AN	None	None	To an Athlete Dying Young	—
AND	Food and Drug Inspectors	None	Crime and Punishment	And Searching Mind*
AS	Parents as Teachers	None	Maryland Self Concept as a Learner Scale	As You Like It
BY	Management by Objectives	None	ABC (Approach by Concept) Method	By Love Possessed*
FOR	English for Special Purposes	None	Fund for Adult Education	For Whom the Bell Tolls*
IN	Reduction in Force	In School Suspension; In State Students	Catcher in the Rye	In Cold Blood
OF	Leaves of Absence	None	Signers of the United States Constitution	Of This Time of That Place
ON	Time on Task	On Campus Students; On the Job Training	Soul on Ice	On the Origin of Species
OR	Publish or Perish Issue	None	Truth or Consequences Administrative Unit NM*	—
PER	Expenditure per Student	None	—	Per Capita*
THE	State of the Art Reviews	None	College of the Sea (England)	Graduate (The)
TO	Adjustment (to Environment)	None	Pathways to Identity Project	To Kill a Mockingbird

LC = Lower Case; UC = Upper Case
*Not Currently an Identifier

FIGURE VII-11: **CAPITALIZATION OF ARTICLES/CONJUNCTIONS/ PREPOSITIONS IN DESCRIPTORS AND IDENTIFIERS**

d. Punctuation of Index Terms

Punctuation of Descriptors and Identifiers is kept to a bare minimum because the special characters used in punctuation can later create severe matching problems in the retrieval process.

★*The only punctuation marks permitted as part of index terms are left and right parentheses (as used to enclose a qualifier). Hyphens, dashes, apostrophes, quotation marks, periods, commas, and all other such special characters, are invalid in the Descriptor and Identifier fields.*

Semicolons are used as subfield delimiters, separating one index term from another, but are not valid as part of an index term.

e. Overindexing and Underindexing

(See also the "Indexing Reminders — Overindexing" section of the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)* [Appendix C].)

One of the most prevalent indexing faults is the assignment of too many or too few index terms. These two faults tend to be mutually exclusive. The indexer that overindexes generally does not also underindex, and vice-versa.

Underindexing is generally the result of failure to put oneself in the position of the searcher or end user. An underindexed item is generally either tagged with a few broad terms behind which the document is effectively lost, or it is tagged with a few specialized terms the indexer is grateful to find in the title or abstract.

Overindexing can generally be traced to the following factors:

- failure to take the time to decide what is truly indexable information and what is merely mentioned in passing. It takes less time to overindex than to index with discrimination.
- the inclusion of several terms all beginning with the same lead-in word, e.g., Parent Education, Parent Participation, Parent Conferences, Parents, Parent Influence, Parent Role. The indexer, abrogating the responsibility to choose the "best" term to represent a given conceptual area, takes the scattergun approach or throws in all the possibilities.
- permitting an imbalance between the size of the document (i.e., small) and the number of index terms (i.e., many). The indexer, forgetting the end user, squeezes every concept out of a five- or six-page paper even though many terms may be represented by less than a significant amount of text. A user retrieving such a minor amount of material is unlikely to thank such an indexer.

- the thesaurus does not offer specific enough terminology to index a complex topic and the indexer, fearing that the user will not find the document, zealously offers as many approaches with Descriptors as can be imagined. Unfortunately, this leads to as many false drops as relevant hits. This situation can almost always be avoided by using he Identifier field for supplemental specific indexing.

In many instances, experience alone will reduce the tendency to overindex or underindex. As the indexer gains confidence with his/her indexing ability and with the ability of thesaurus language to lead users to the document, indexing will improve. Indexers often benefit from training and experience in searching, so that they can see the impact of overindexing and underindexing on retrieval.

6. Indexing Review

After the indexer has completed all the basic tasks involved in indexing (other than recording and input—see item "7" immediately following), i.e.:

- examination of the document;
- identification of indexable concepts;
- translation of selected concepts into *Thesaurus* terminology;
- matching non-*Thesaurus* concepts to the terms or preferred formats of the *Identifier Authority List* (IAL);
- tagging of major concepts/terms with asterisks;
- documenting new indexing terms not in the *Thesaurus* or IAL for future use;
- consideration of recommending new or existing Identifiers as candidate Descriptors—completion of *Vocabulary Development Form* (see Section VIII, Part 1),

the finished product should receive a final review. This review may be accomplished by the indexer or by a Supervisor/Reviewer. The following questions should be asked about the work:

1. Do the designated Major terms represent the emphasis of the document?
2. Are the Major terms reflected (conceptually or by equivalent terms) in the Abstract or Title, so that there may be no question in the user's mind about their relevance?
3. Are the possibilities for "False Drops" minimal?
4. Are all significant and important concepts in the document covered by Descriptors or Identifiers?

5. Can the index terms be fitted together in narrative form to provide an accurate idea of the subject matter of the document?

6. Has excessive "clustering" of terms beginning with the same word been avoided?

7. Do the Major terms provide a class description that could be expected to occur spontaneously to a user, or are they too specialized and obscure?

8. If the scope of the document overlaps with other Clearinghouses, have their viewpoints been taken into account (e.g., by consulting their "indexing rules" in the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)*, and via examination of their scope of interest statement and "most frequently used Descriptors" list?).

7. Recording and Input of Indexing on ERIC Resumes

The rules for transcribing onto the document/journal article resume all Descriptors and Identifiers finally selected in indexing, and for identifying them as Major or Minor, are provided in the "Data Entry" section of this manual (Section IX). The characteristics, limitations, and requirements for completing the Descriptor and Identifier fields are covered in the "Cataloging" section (Section V).

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Section VIII:
Vocabulary Development and Maintenance (Part 1)—Descriptors

May 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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SUMMARY OF SIGNIFICANT RULES

1. ERIC's indexing vocabulary provides standard, controlled, subject-concept entries for use in printed indexes and computer-manipulatable files. Entries must represent concepts found in actual documents/articles processed by the system. Control is necessitated by variability found in the language of documents and the language of system users.

2. ERIC's indexing vocabulary consists of Descriptors and Identifiers. Descriptors are meaningful terms or short phrases that, for the most part, represent general classes of things found in the literature. Multiword Descriptors are used whenever single-word Descriptors cannot adequately describe concepts in the literature. Descriptors (singly, or two or more in coordination) will usually adequately represent the ideas and concepts found in a document/article. To identify specific entities (such as pieces of equipment, geographic areas, and other proper nouns and noun phrases), however, Identifiers must be used. Identifiers add a depth to indexing that is not always possible with Descriptors alone. Identifier indexing is intended to supplement Descriptor indexing and is, therefore, to be done in addition to (rather than in lieu of) Descriptor use. Descriptors are defined, interrelated by a system of cross-references, and alphabetically displayed in the *Thesaurus of ERIC Descriptors*. Identifiers are alphabetically displayed in the *Identifier Authority List* (IAL), which serves as a companion volume or supplement to the *Thesaurus*.

3. The *Thesaurus of ERIC Descriptors* is a list of several thousand formally controlled terms. Many terms in the *Thesaurus* refer from "non-preferred" forms to preferred terminology. Descriptors represent the preferred (i.e., indexable) entries. Non-preferred terms (i.e., USE references) are either: (1) synonyms and other variant word forms; or, (2) concepts that are seldom used in the literature covered by ERIC and that can be searched equally well under a broader entry.

4. The *Thesaurus* is displayed in four sequences: Alphabetical Display (primary arrangement); Rotated Display; Hierarchical Display; and Descriptor Group Display. Only the full entries in the Alphabetical Display should be used for direct indexing (or searching). The abbreviated entries in the three secondary displays serve as indexes, in effect, to the Alphabetical Display.

5. Not all Identifiers are proper nouns. Any term or phrase new to the literature will, as a rule, first be "tried out" as an Identifier before it gains Descriptor status. This practice allows a concept to be monitored while information about its usage and/or acceptance among various authors is accumulated. Frequency of indexing occurrence is an important consideration in deciding whether to add a new conceptual-type term to the *Thesaurus*.

6. Indexers have the responsibility of recommending changes to the *Thesaurus* when they find subject concepts in the literature that cannot be expressed or indexed adequately with the existing terminology. Each Clearinghouse must assume a proportional share of vocabulary activities, if a balance across subject areas represented in the vocabulary is to be maintained. As a general "rule of thumb," concepts should be considered candidate Descriptors after 5 usages as Identifiers, and should be included somewhere in the structured *Thesaurus* vocabulary (either as preferred or as non-preferred terms) after approximately 10 usages. Excluded from this rule are, of course, those Identifiers representing proper nouns that cannot qualify for Descriptor status.

7. The Vocabulary Development Form, whether the original pre-printed paper form or a microcomputer-prepared

substitute template, is the input form to be used for all *Thesaurus* transactions, whether adding a term, deleting a term, or modifying an existing term's display. The choice of paper form or computer template is left to the preparer's discretion. The form permits entry or change of all cross-references, including Used For (non-preferred) terms (UF), Narrower Terms (NT), Broader Terms (BT), and Related Terms (RT). It also accommodates input or revisions of Scope Notes and Group Codes. Full justification must be provided on the Vocabulary Development Form for each *Thesaurus* transaction. Authorities must always be cited for new Descriptors, or for redefined or merged existing Descriptors. A minimum of three authorities must be cited for each definitional Scope Note prepared. Care should be taken to avoid parochial points of view. Compromise may be necessary when the terminology needs of separate areas of specialization are in conflict.

8. Assignment of a Group Code refers to the placement of a particular Descriptor in one, and only one, of 41 Descriptor Groups (broad subject categories that provide a *Thesaurus* overview). Scope Notes are brief statements of intended usage, for the purpose of either restriction or explanation; they should not be construed as formal definitions, but as indicators of how terms are (or should be) used in indexing. Instructional notations frequently are part of Scope Notes. These notations direct the *Thesaurus* user to other terms, indicate proper coordination, provide historical notes on changes in usage or cross-reference structure, or otherwise guide and explain preferred usage for both indexing and searching. Because of the inherent "softness" or imprecision of educational terminology, ERIC carries Scope Notes on all Descriptors whose meanings or intended usages are not self-evident.

9. A significant tenet of the ERIC vocabulary development process is the practice of keeping the authority files and the index (postings) files synchronous, i.e.,

   - As a new term is added to the authority files, a special effort is made to locate uses of the term and its variants in the database and to update its postings accordingly.

   - When an obsolete or ambiguous term is removed from the authority files, every effort is made to also delete the term from the postings files.

   - Some changes require manual reindexing (i.e., individual examination and reindexing of original records). Ambiguous terms whose prior usages cannot be conveniently re-examined, may be made invalid.

10. *Thesaurus* cross-references are subject to the following basic rules:

    - The NT-BT relationship is one of class membership. An NT must be entirely a member of the class defined by its BT. Called hierarchical, the NT-BT relationship provides the capability for fine-tuning indexing and searching processes to the most appropriate (i.e., specific) level of subject matter.

    - Close conceptual relationships among Descriptors not in the same hierarchy are displayed via the RT cross-reference.

    - All cross-references are reciprocal, i.e., for every entry, a corresponding complementary entry must appear elsewhere. That is, for every UF entry, there is a USE reference; for every NT, there is a BT; for every BT, there is an NT; for every RT, there is another RT. It is not necessary for the preparer of a Vocabulary Development Form to generate cross-reference reciprocals, as this is done automatically by the *Thesaurus* software.

11. The principal mechanics of Descriptor construction are as follows:

    - Abbreviations and acronyms should generally be avoided as Descriptors; they may be treated as non-indexable USE references.

- Maximum length of Descriptors and USE references is 50 characters, including blanks (i.e., spaces between words).
- Noun forms are preferred to verb forms (e.g., PUBLICITY, not PUBLICIZE).
- The plural form is used for "count nouns" (e.g., APTITUDE TESTS), about which one may ask "how many?"
- The singular form is used for "mass nouns" (e.g., AUDIENCE PARTICIPATION), about which one may ask "how much?"
- Descriptors and USE references judged to be homographs must have parenthetical qualifiers (e.g., CASE (GRAMMAR)).
- Sex neutral Descriptors are preferred when a concept is intended to refer to both sexes (e.g., SEAFARERS, not SEAMEN). Sexist terminology that commonly appears in the literature may be entered as USE references.
- Descriptors may consist of alphabetic characters, Arabic numerals, left and right parentheses, and blanks. Other characters are not acceptable.
- Inverted entries (e.g., PLANNING (FACILITY)) should be avoided. The Rotated (i.e., permuted) Display obviates the need for inverted entries.

12. The Vocabulary Development Program provides a system-wide participatory mechanism for coordinating and implementing changes to the ERIC *Thesaurus*. Through the Vocabulary Review Group, ERIC Clearinghouses and selected users are given the opportunity to review all proposed changes and additions prior to final review/implementation by the ERIC Facility.

VIII. VOCABULARY DEVELOPMENT AND MAINTENANCE (PART 1) -- DESCRIPTORS

A. Introduction

A vocabulary for information retrieval provides standard, controlled, subject-concept entries for use in printed indexes and computer manipulatable files. Without vocabulary control, concepts become scattered under many variant entry forms, with a consequent loss in system utility.

The *Thesaurus of ERIC Descriptors* is the principal indexing vocabulary used in the ERIC system and is the basis for most of the subject entries in the ERIC database. The *Thesaurus* is a list of several thousand cross-referenced, single-word and multiword concepts representing the subjects found in the database. Many terms in the *Thesaurus* refer from "non-preferred" forms to preferred terminology. Preferred entries in the *Thesaurus* are labeled "Descriptors." Non-preferred terms are either: (1) synonyms and other variant word forms, or (2) concepts that are seldom used in the literature covered by ERIC and that can be searched equally well under a broader entry.

Subject entries in ERIC's indexes and computer files that are not Descriptors are based on a companion volume to the *Thesaurus*, the *Identifier Authority List* (IAL). Identifiers are usually names of specific entities (i.e., proper names) and serve as indexing adjuncts to Descriptors; they may also represent subjects that have only recently been introduced to the ERIC database and, as yet, have not been accepted as *Thesaurus* terms.

The field of education covers most areas of knowledge. The list of conceivable subjects covered by writers in the field, and the variety of ways those writers use to express the same subject, would be troublesomely long and overlapping without some term-use restrictions. The *Thesaurus* and IAL specify such restrictions for ERIC.

Section VIII of the *ERIC Processing Manual* covers these two publications and the development and maintenance of their terminology, in separate discussions: Part 1 -- Descriptors; Part 2 -- Identifiers.

1. Thesaurus -- Definition and Function

The word "thesaurus" comes from the Greek word for treasure or treasury. Roget's famous thesaurus is a treasury of sorts. It gives a writer a choice of many alternative words with subtle shadings of meaning to express single concepts. On the other hand, a thesaurus developed for information retrieval purposes might be looked at more as a treasure map, leading a user to a treasury of stored information. A preferred term is selected among several possible terms, and users are directed, by means of references from alternative forms, to employ this one term.

An information retrieval thesaurus is, therefore, a term-association list structured to enable indexers and subject analysts to describe the subject content of a document to a desired level of specificity at input, and to permit searchers to describe in precise terms the information required at output. A thesaurus serves as an authority list of the filing labels that permit information to be stored by one person and retrieved by another. It is a device to bring into coincidence the language of the documents and the language of indexers and inquirers.

The thesaurus concept has been widely adopted for vocabulary control in modern post-coordinate information systems. It is similar in structure and organization to the conventional list of "subject headings." It lists Descriptors alphabetically, endeavors to control synonyms and homographs, and displays generic-specific and other relationships between terms.

A thesaurus of Descriptors, interrelated by cross-references, provides the basic rules of communication for an information system. As an information system grows, its thesaurus can be systematically built and refined to the point where it represents, in a sense, the vocabulary of the subject field involved. A functional thesaurus must be logical and accurate and have an internal integrity in relation to the guidelines upon which it has been built. The ultimate success or failure of a thesaurus depends, however, on the extent of its usefulness as a communication tool in an information system.

2. Descriptors -- Definition and Function

Descriptors are meaningful terms or short phrases that are used to characterize a document and to provide index entries to it. Descriptors, for the most part, represent general classes of things discussed in the literature. Many will be found in the general authoritative dictionaries, while the remainder can usually be located in one or more specialized dictionaries. Descriptors are the basic building blocks that, when defined and interrelated by a system of cross-references, comprise an information retrieval thesaurus.

Descriptors perform a dual function: (1) they permit an indexer to describe the subject elements of a document so that it (or a surrogate record) may be stored in a system for future search and retrieval purposes; (2) they permit a searcher to construct a question using terms that are known to have been used in indexing. In both instances, the extreme variability of the language found in documents and the language used by inquirers is reduced by reliance on a standard vocabulary. In this sense, the Descriptors represent the communication link between the operators and users of the system and its content. Descriptors are closely related (but not identical) to both the "subject headings" that one finds in conventional library systems and the "keywords" that one finds in full-text or uncontrolled vocabulary situations.

Descriptors (singly, or two or more in coordination) will usually adequately represent the ideas and concepts found in a document. To identify specific entities (such as pieces of equipment or geographic areas), however, Identifiers must be used. Rules and guidelines for Identifiers are covered by Section VIII (Part 2).

3. Educational Terminology

Many of the problems encountered in the development of the ERIC *Thesaurus* directly reflect problems inherent in the relatively "soft" or imprecise language of education and the social sciences. The subject matter of the physical sciences and engineering, in contrast, lends itself much more readily to close definition and commonly accepted language and word usage.

In most indexing schemes, the basic objective is to break down common language or terminology into its simplest components while still retaining adequate definition. This objective is often reflected in a thesaurus or word list comprised mostly of single-word terms. In the ERIC *Thesaurus*, however, there is an abundance of compound (multiword) terms. This fact can be explained in terms of the educational process itself. This process basically involves students, teachers, and an educational environment. The events occurring during the educational process can often be applicable equally to any of the three components. In an indexing system that relies on the coordinative use of several terms to represent complex topics, it is difficult to distinguish the source of an action and the recipient of an action without separately defining each. For example, if there is a document dealing with "the influence of the teacher on the attitudes of students," it is theoretically possible to index such a document by coordinating the concepts of "influences," "attitudes," "teachers," and "students." In retrieval, however, how are searchers to know whether they are retrieving documents that deal with "student attitudes" or "teacher attitudes," or, for that matter, with "student influences" or "teacher influences"? To avoid confusion, these concepts can be distinguished by indexing the document in question by the multiword terms "student attitudes" and "teacher influence." In an environment as complex as that of the educational process, this type of compounding, binding, or "precoordination" of terms is often unavoidable.

Beyond the considerations of logic and retrievability, however, there is also the question of how people actually think and express themselves in the language of a subject field. In the interest of clarity, unity, meaningfulness, and recognizability, a thesaurus must represent and preserve the natural language of its field. For better or worse, much of the language of education consists of compound terminology.

The ERIC *Thesaurus* is widely recognized in the United States as the most current, definitive vocabulary tool in the domestic education field. It is also recognized as an international authority. For example, its terms and Scope Notes (i.e., definitions) are used in such references as the *UNESCO:IBE Education Thesaurus* and the *International Dictionary of Education*. The ERIC vocabulary is seen throughout the world in a variety of indexing tools, e.g., the *Japanese-English Educational-Use Keyword Equivalents* published by the Center for Educational Technology, Aichi University of Education, Japan. The combined format, structure, and terminology of the ERIC *Thesaurus* repeatedly has served as a model for education thesauri of other nations, particularly the English-speaking countries. Recent new national thesauri based on the ERIC model include the *Australian Thesaurus of Education Descriptors* (1984), the *British Education Thesaurus* (1988), and the *Canadian Education Thesaurus* (1991, in English and French).

B. Lexicography as Practiced in the ERIC System

1. General

ERIC is a decentralized network, and the development and maintenance of the ERIC *Thesaurus* is a decentralized operation. The real "architects" of the *Thesaurus* are the Clearinghouse indexers engaged in the day-to-day processing of documents for input. Indexers have the responsibility of recommending changes to the *Thesaurus* when they find subject concepts in the literature that cannot be expressed or indexed adequately with the existing terminology.

ERIC indexers, like the network they support, are decentralized. As Clearinghouse staff members, their indexing is primarily confined to documents in the subject specialty area covered by their particular Clearinghouse, and represents the terminology of that specialty area and the viewpoints of its practitioners and users. Part of the strength of the ERIC *Thesaurus* is its reflection of the specialist's point of view. (Of course, each Clearinghouse must assume a proportional share of vocabulary activities if a balance across subject areas is to be maintained.)

The subject specialist's interpretation of terminology, however, must frequently be moderated. Education encompasses wide-ranging subject fields, and ERIC is responsible to a highly diversified user community. Frequently, one Clearinghouse's interpretation of subject matter will not coincide with that of another. ERIC avoids the trap of parochial points of view by providing centralized lexicographic analysis and control, an ongoing function of the ERIC Processing and Reference Facility.

2. Principal Lexicographic Functions

All ERIC vocabulary recommendations (whether new terms or modifications, *Thesaurus*-related or Identifier-related) are reviewed by the Facility lexicographic staff. Terms, definitions, and cross-reference structures are analyzed and evaluated to make sure they:

- Maintain Consistency
- Avoid Proliferation
- Clarify Ambiguities
- Conform to the Vocabulary Coordination Procedures Set Forth in the *ERIC Processing Manual*

Each of these functions is important enough to be explained with some examples.

a. Maintain Consistency

Clearinghouses working independently can generate inconsistent terminology. For example, the concepts "academic" and "scholastic," although varying slightly in meaning can be considered synonymous for purposes of retrieval. The use of both concepts in the *Thesaurus* would create a problem of inconsistency.

Example: Clearinghouse A submits
SCHOLASTIC FAILURE
UF ACADEMIC FAILURE

Clearinghouse B submits
ACADEMIC APTITUDE
UF SCHOLASTIC POTENTIAL

Clearinghouse C submits
ACADEMIC ACHIEVEMENT
UF SCHOLASTIC ACHIEVEMENT

Clearinghouse D submits
SCHOLASTIC ABILITY
UF ACADEMIC ABILITY

(UF="Used For..."---See item D.5 of this section.)

Problem: Even though the compound terms involved are not exact synonyms, if they all went into the *Thesaurus* as submitted, consistency would obviously be lacking and retrieval would be more difficult. Users

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would be puzzled by what they would assume to be a distinction made by the system between "academic" and "scholastic." This problem cannot be solved at the level of the Clearinghouses, as one Clearinghouse is often not aware of another's term preferences and choices.

Solution: Central lexicography receives the recommendations from the A, B, C, and D Clearinghouses. Since all the information has been assembled at one point, the problem can be recognized. The four candidate terms are analyzed to see whether they can reasonably coexist in the same system. This analysis may be aided by consulting reference works. It obviously must first be determined whether the two terms "academic" and "scholastic" are synonyms and, if so, which is preferred. In this particular case, the conclusion was that the terms are synonymous for purposes of retrieval, and that "academic" is more widely used than "scholastic." Most often, such a decision establishes a precedent that will then apply to later decisions and that in the observance will lend consistency to the system's vocabulary.

b. Avoid Proliferation

Decentralized input can also lead to a proliferation of redundant and essentially duplicate concepts, with subsequent loss of retrieval effectiveness. To avoid such situations, synonymous or unnecessary variants must be stored under selected "preferred" terms.

Example: Clearinghouse A submits
BICULTURAL EDUCATION

Clearinghouse B submits
INTERCULTURAL EDUCATION

Clearinghouse C submits
MULTICULTURAL EDUCATION

Clearinghouse D submits
MULTIETHNIC EDUCATION

Problem: Without central control, all of the terms in the example might well enter the *Thesaurus*, leading to four terms where one would do. Searchers conducting inquiries in this topical area would then be burdened unnecessarily with the task of incorporating all four terms into their strategies because any other approach might fail to retrieve essential material.

Solution: Central lexicographic control can solve this problem via research, rational decision-making based on findings, and the recording of this process for use in later problem situations. In this case, MULTICULTURAL EDUCATION was selected as the preferred form and cross-references were made to it from the other three terms.

c. **Clarify Ambiguities**

Specialists in one field may be unaware that their terminology may have different meanings in other fields.

Example: Clearinghouse A submits LEARNING CENTERS

Clearinghouse A's field of specialization covers the education of young children, and the Clearinghouse understands LEARNING CENTERS to be an "open education" term meaning "areas inside classrooms (e.g., a table) in which instructional materials have been gathered for unstructured, self-directed learning." It can be assumed that this is a common term in Clearinghouse A's field and that they see no ambiguity in it. With the "blinders" of the specialist on, Clearinghouse A has unwittingly submitted a homograph.

Problem: LEARNING CENTERS may appear to present no problems to the indexers and searchers in Clearinghouse A's field of specialization. Imagine, however, the many uses and interpretations that could be applied to such a term across other areas of knowledge. The term could be misinterpreted to mean many different kinds of facilities and institutions, including schools, counseling centers, libraries, psychoeducational clinics, job training centers, etc. Before too long, the term might be used in so many different ways that it could no longer be searched specifically for the originally intended "classroom" context. Users, particularly in Clearinghouse A's field, would be faced with many "false drops," and wasted searches might be repeated in one way or another by hundreds of users.

Solution: Potential ambiguity of terminology can be readily detected from the broad, unrestricted point of view of central lexicography. Once the need for Scope Notes is discerned, contact can be made with initiating Clearinghouses to request that definitions be prepared. In this case, a parenthetical qualifier was also needed to assure correct usage. The resultant entry in the *Thesaurus*, LEARNING CENTERS (CLASSROOM) with its restrictive Scope Note, is unambiguous.

d. **Conform to the Vocabulary Coordination Procedures Set Forth in the *ERIC Processing Manual***

With the assistance of a number of lexicographic consultants and terminological specialists over the years, a set of formal vocabulary rules has evolved for ERIC Descriptors and Identifiers. All rules for Descriptors are set forth in this section of the ERIC Processing Manual, Section VIII (Part 1), and all rules for Identifiers are documented in Section VIII (Part 2).

These rules cover the policies and the mechanics of both vocabulary generation and selection. For instance, an important policy is that "Descriptors should represent important concepts found in the literature of the database rather than concepts derived independently." Matters of Descriptor/Identifier mechanics covered are, for example: noun forms preferred over verb forms, inverted entries avoided, no punctuation other than parentheses, use of parentheses limited to qualifying homographs or indicating "life spans" of formerly indexable concepts.

The rules are designed to impose order and internal integrity on the ERIC vocabulary and are to be observed both by the personnel submitting candidate terminology and by the central lexicographic staff evaluating the submissions.

Not all situations can be covered, however, in any single set of rules. (The *ERIC Processing Manual* is analogous in this regard to a constitution rather than to a set of statutes.) Vocabulary and other processing rules must leave the way open for compromise action when requirements are in conflict. ERIC Lexicographers and Clearinghouse personnel work together in interpreting the rules in order to achieve the overall objectives of the system.

3. Vocabulary Development Program

The Vocabulary Development Program is a procedure for coordinating and implementing changes to the ERIC *Thesaurus*. The flow of the program is illustrated in **Figure VIII-1-1**.

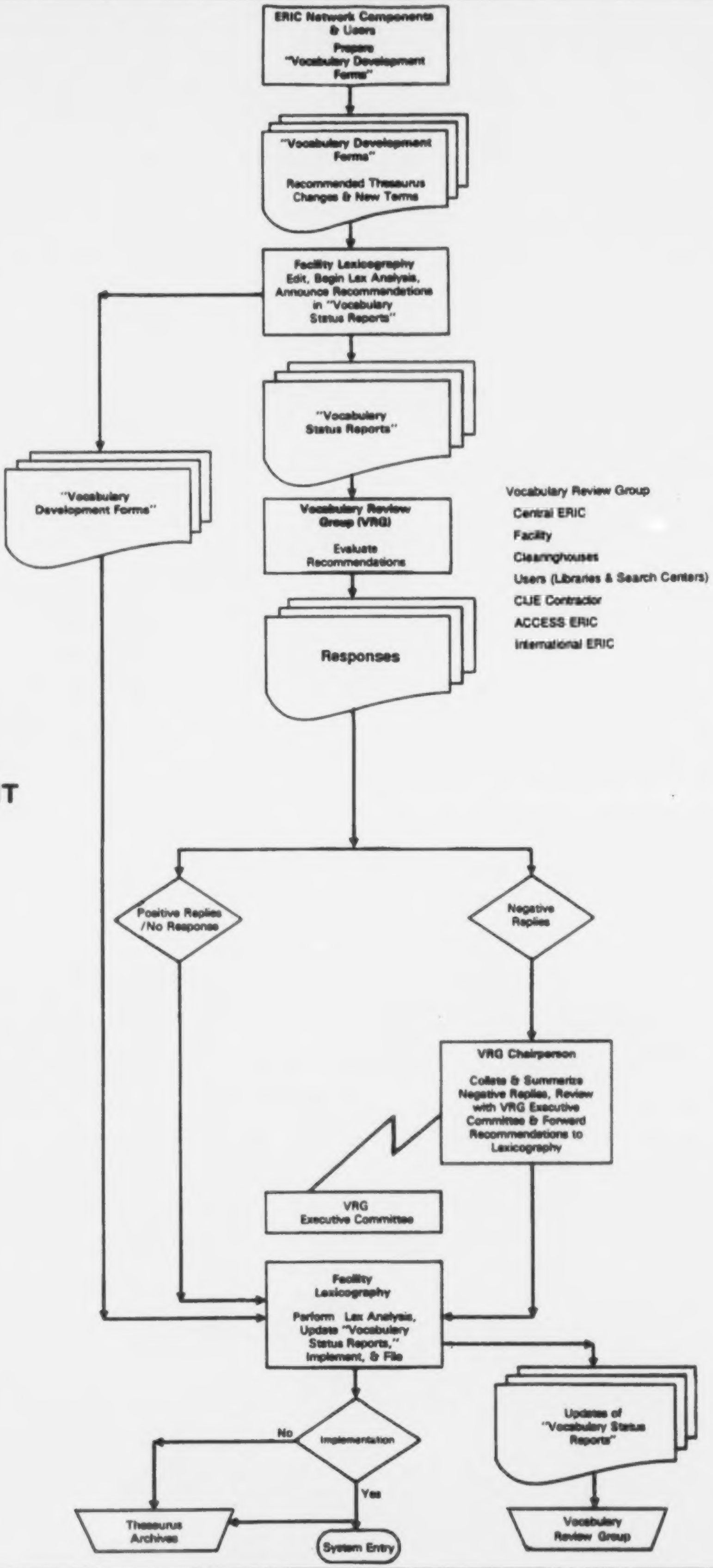
The Vocabulary Development Program provides the means for each component of the decentralized ERIC system to participate in thesaurus development and maintenance. Initiated in December 1980, the program grew out of ERIC's experience with the 1977-80 Vocabulary Improvement Project (VIP) and the *Play Thesaurus* (see **Attachment #1** of this section, *"History of the Thesaurus..."*). As in the past, the emphasis continues to be on total network involvement in *Thesaurus* development, with a streamlined approach.

a. One basic procedure and one form are used for the submission and review of all proposed changes to the ERIC *Thesaurus*.

   The characteristics and uses of the "Vocabulary Development Form" are covered in item "E" of this section.

b. ERIC Clearinghouses and selected users are given the opportunity to review all proposed changes and additions prior to final review/implementation by the Facility lexicographic staff.

c. A Vocabulary Review Group (VRG) of 29 members serves as the review/advisory group for the Vocabulary Development Program. In addition to reviewing specific recommendations for changes and new terms, the VRG is responsible for evaluating vocabulary-related policy matters and for recommending viable alternatives for long-range *Thesaurus* development. The VRG membership includes:


ERIC Network Components & Users
Prepare "Vocabulary Development Forms"
"Vocabulary Development Forms"
Recommended Thesaurus Changes & New Terms
Facility Lexicography
Edit, Begin Lex Analysis, Announce Recommendations in "Vocabulary Status Reports"
"Vocabulary Status Reports"
"Vocabulary Development Forms"
Vocabulary Review Group (VRG)
Evaluate Recommendations
Vocabulary Review Group
Central ERIC
Facility
Clearinghouses
Users (Libraries & Search Centers)
CIJE Contractor
ACCESS ERIC
International ERIC
Responses
Positive Replies /No Response
Negative Replies
VRG Chairperson
Collate & Summarize Negative Replies, Review with VRG Executive Committee & Forward Recommendations to Lexicography
VRG Executive Committee
Facility Lexicography
Perform Lex Analysis, Update "Vocabulary Status Reports," Implement, & File
Updates of "Vocabulary Status Reports"
No
Implementation
Yes
Thesaurus Archives
System Entry
Vocabulary Review Group

ERIC
VOCABULARY DEVELOPMENT
PROGRAM—FLOWCHART

FIGURE VIII-1-1

- 16 - ERIC Clearinghouse Coordinators
- 1 - Facility Lexicographer (also, the Facility Identifier Coordinator is an "ex officio" member)
- 1 - ACCESS ERIC Representative
- 1 - CIJE/*Thesaurus* Publisher
- 1 - Central ERIC Monitor
- 5 - User Representatives:
  A university librarian; a school librarian (manual search facility); staff member of an online search facility; staff member of an information/documentation center related to education; and an educational practitioner.
- 3 - "International ERIC" Representatives:
  Representatives of the *Australian Education Index*, *British Education Index*, and *Canadian Education Index*. International ERIC (informally, InterEd) is a long-term initiative for international cooperation among the major English-language education-related databases.

d. VRG members are appointed by Central ERIC. Members serve as long as they want, at the discretion of Central ERIC. Clearinghouse directors are responsible for nominating the Clearinghouse representatives.

e. The VRG Executive Committee is composed of the VRG Chair, the Facility Lexicographer, and the Central ERIC Monitor. The purpose of this committee is to resolve any problems/conflicts identified by the larger review group.

f. The VRG is chaired by a Clearinghouse Coordinator appointed by Central ERIC. The Chair of the VRG assumes the following responsibilities:

- Coordinate activities of the VRG and act as liaison among Facility, Clearinghouses, users, and Central ERIC.
- Receive from the VRG members all negative comments pertaining to proposed *Thesaurus* changes.
- Collate and summarize those negative responses.
- Arrange coordination sessions with the VRG Executive Committee as needed to assess negative responses, calling for the assistance of other Clearinghouse Coordinators on an "ad hoc" basis.
- Prepare final recommendations for Facility Lexicographer.

g. Facility Lexicography prepares a 1- to 6-month *Vocabulary Status Report* (at least two per year) summarizing all recommended *Thesaurus* changes received from Clearinghouses and external users during the respective time period. Brief annotations, e.g., Scope Notes for new terms, accompany each change listed on the status report form (see example in **Figure VIII-1-2**). The status report serves as the mechanism for alerting the VRG to proposed changes and for soliciting the membership's comments and recommendations. Reviewers may comment directly on the form and/or attach more extensive comments. Return of copies from the VRG is scheduled within one or two months of a particular report's distribution. Two copies are returned, one to the Facility for the ERIC lexicographic archives and the other to the VRG Chair for final review and summation of voting. The final disposition of each recommended change is included in an updated status report that is redistributed to the VRG (see example in **Figure VIII-1-3**). Additional VRG review may occasionally be necessary if there are contested dispositions.

h. The review cycle for the Vocabulary Development Program, from receipt to disposition, varies from 2 to 9 months. Turnaround time usually depends on the volume of *Thesaurus* changes received, which affects in turn how often Vocabulary Status Reports are issued.

i. The membership of the VRG is announced periodically in the *Interchange* newsletter (published by ACCESS ERIC) in order to encourage ERIC users interested in accomplishing additions of new *Thesaurus* terminology, or those encountering other situations in subject searching, to interact with the VRG.

j. Facility Lexicography is responsible for implementing all approved recommendations to the *Thesaurus* file, and making any necessary postings updates to the index (inverted) files to ensure their compatibility with the updated *Thesaurus*. (See "Synchronization of Lexicography and Indexing," item B.5 of this section.) Additionally, the lexicographic staff prepares a "final report" of each 1- to 6-month *Thesaurus* update entitled *Thesaurus Changes and Statistical Data* (not shown in the flow of the Vocabulary Development Program, **Figure VIII-1-1**). This report contains three standard attachments, as follows:

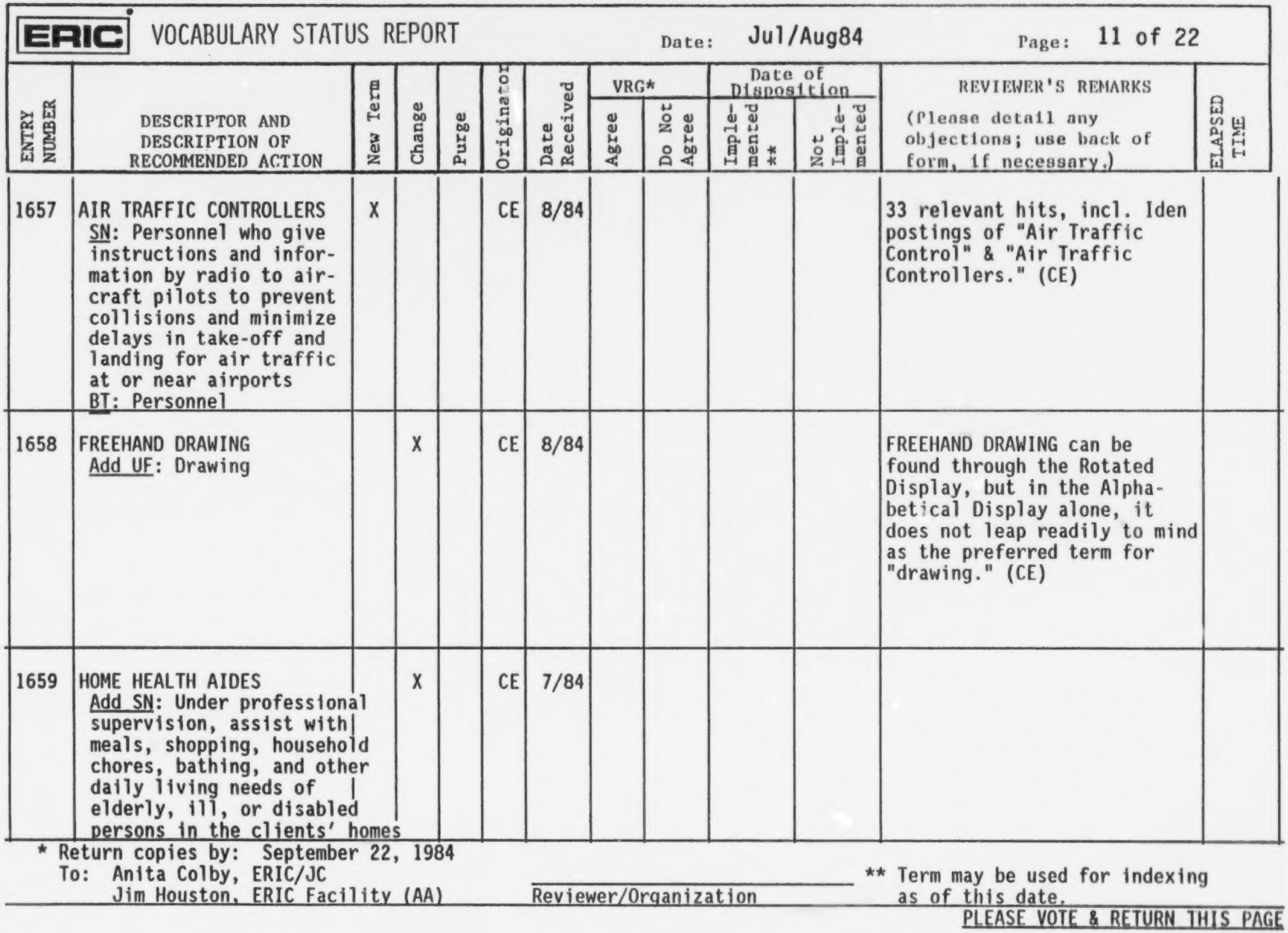
- Attachment 1 provides a listing of the major *Thesaurus* transactions in the file update. It serves as a supplement to working editions of the *Thesaurus*, and is used by the CIJE/*Thesaurus* Publisher to update the Thesaurus Additions and Changes sections of RIE and CIJE. (Thesaurus Additions and Changes serves as a supplement to users of the commercial, published *Thesaurus*.)
- Attachment 2 gives total *Thesaurus* input and disposition statistics for the current update.
- Attachment 3 gives the cumulative total terms in the *Thesaurus* file as of the current update.

4. Participation by External Users

ERIC encourages direct participation by external users in its vocabulary development activities. Users have been involved in the development of the ERIC *Thesaurus* since its beginning, i.e., reviewing terminology and serving in advisory roles when major changes in *Thesaurus* coverage and format were being considered.

Users are kept abreast of current vocabulary activities through Clearinghouse

VOCABULARY STATUS REPORT -- EVALUATION PHASE



ERIC VOCABULARY STATUS REPORT Date: Jul/Aug84 Page: 11 of 22

ENTRY NUMBER	DESCRIPTOR AND DESCRIPTION OF RECOMMENDED ACTION	New Term	Change	Purge	Originator	Date Received	VRG* Agree	VRG* Do Not Agree	Date of Disposition Implemented **	Date of Disposition Not Implemented	REVIEWER'S REMARKS (Please detail any objections; use back of form, if necessary.)	ELAPSED TIME
1657	AIR TRAFFIC CONTROLLERS SN: Personnel who give instructions and information by radio to aircraft pilots to prevent collisions and minimize delays in take-off and landing for air traffic at or near airports BT: Personnel	X			CE	8/84					33 relevant hits, incl. Iden postings of "Air Traffic Control" & "Air Traffic Controllers." (CE)	
1658	FREEHAND DRAWING Add UF: Drawing		X		CE	8/84					FREEHAND DRAWING can be found through the Rotated Display, but in the Alphabetical Display alone, it does not leap readily to mind as the preferred term for "drawing." (CE)	
1659	HOME HEALTH AIDES Add SN: Under professional supervision, assist with meals, shopping, household chores, bathing, and other daily living needs of elderly, ill, or disabled persons in the clients' homes		X		CE	7/84						

* Return copies by: September 22, 1984
To: Anita Colby, ERIC/JC
Jim Houston, ERIC Facility (AA)

Reviewer/Organization

** Term may be used for indexing as of this date.

PLEASE VOTE & RETURN THIS PAGE

VOCABULARY STATUS REPORT -- FEEDBACK PHASE

ERIC VOCABULARY STATUS REPORT Date: Oct84 Page: 4 of 23

ENTRY NUMBER	DESCRIPTOR AND DESCRIPTION OF RECOMMENDED ACTION	New Term	Change	Purge	Originator	Date Received	VRG* Agree	VRG* Do Not Agree	Date of Disposition Imple- mented **	Date of Disposition Not Imple- mented	REVIEWER'S REMARKS (Please detail any objections; use back of form, if necessary.)	ELAPSED TIME
1657	AIR TRAFFIC CONTROL SN: Scheduling and monitoring the flow of air traffic at airports, during approaches, and en route BT: Traffic Control	X			CE	8/84	16	4	10/84		33 relevant hits, incl. Iden postings of "Air Traffic Control" & "Air Traffic Controllers." (CE) - - - - - - - - - - - - - - - - Changed from AIR TRAFFIC CONTROLLERS. Since the VIP, ERIC has favored "occupation" terms over "personnel" terms, especially in areas on the periphery of education. Change is in line with other social science thesauri such as Psyc Abs & Mgmt Contents. SN modified per remorks of CG/PS/SP/TM/UD. (VRG)	2 mos
1658	FREEHAND DRAWING Add UF: Drawing (Freehand) COMPUTER GRAPHICS Add UF: Drawing (Computerized) DRAFTING Add UF: Drawing (Precision Draft)		X		CE	8/84	18	1	10/84		FREEHAND DRAWING can be found through the Rotated Display, but in the Alphabetical Display alone, it does not leap readily to mind as the preferred term for "drawing." (CE) - - - - - - - - - - - - - - - - Modified per AA. "Drawing" should not be restricted to one access point. (VRG)	2 mos
1659	HOME HEALTH AIDES Add SN: Workers who, under professional supervision, provide routine health/personal care and housekeeping services in homes of disabled, ill, or elderly clients		X		CE	7/84	17	3	10/84		SN simplified per CG/SP. Subject added per JC/PS/TM/UD/Lake/Wise. (VRG)	3 mos

* Return copies by: [redacted]
To: Anita Colby, ERIC/JC
Jim Houston, ERIC Facility (AA)

Reviewer/Organization

** Term may be used for indexing as of this date.

FEEDBACK PAGE---NO RETURN

newsletters and the *Interchange* newsletter. They frequently interact directly with vocabulary coordinators at the Clearinghouses. Another common occurrence is for users to submit vocabulary recommendations directly to the Facility Lexicographer and to interact with the lexicographic staff over the phone.

Volunteers from the user community also serve as members of the ERIC Vocabulary Review Group, as described in the preceding section B.3.

5. Synchronization of Lexicography and Indexing

A significant philosophical tenet of the ERIC vocabulary development process is the practice of keeping the authority files and the index (postings) files synchronous. (See the "Vocabulary Development Form" and its emphasis on postings, **Figures VIII-1-7** and **VIII-1-8** in item "E.") As a new term is added to the authority files, a special effort is taken to locate uses of the term and its variants in the database and to update its postings accordingly. When an obsolete or ambiguous term is removed from the authority files, every effort is made to delete also the term from the postings files. Some such changes require manual reindexing (i.e., individual examination and reindexing of original records), but most can be accomplished using ERIC's "Transfer-and-Delete" software (in which one transaction suffices to locate all records containing one to several terms, to delete the term or terms, and to replace them with one or more terms, while retaining the original major or minor status of the terms intact).

6. Lexicographic Authorities

The ERIC Facility maintains an extensive collection of lexicographic tools (dictionaries, glossaries, thesauri, encyclopedias, etc.) used to verify, structure, and define terms used in the ERIC vocabulary. Over 300 key references are included in the collection. A list of the principal thesauri and subject-heading lists in this collection appears in item C.1.e.(3) of this section.

Citations of the documents in the lexicographic collection are compiled into a "*Thesaurus* Bibliography." This bibliography is maintained by, and may be obtained from, the Facility. It has appeared in past editions of the published *Thesaurus* and may be made available in future editions, if warranted by user interest.

Additional reference works in Washington metropolitan area libraries are consulted when complex lexicographic problems arise that cannot be researched adequately using the reference materials at hand.

7. Structure of the *Thesaurus of ERIC Descriptors*

To assist the user (indexer or searcher) of the *Thesaurus*, the terminology is arranged in four different sequences, each providing a different approach. The principal or primary arrangement is an alphabetical display of Descriptors (includes a complete, individual display of each Descriptor), with the other three displays acting, in effect, as indexes to the primary display:

PRIMARY ARRANGEMENT	SECONDARY ARRANGEMENTS
Alphabetical Display	Rotated Display
	Hierarchical Display
	Descriptor Group Display

SPECIAL NOTE: None of the three secondary arrangements show Descriptors in their complete context. Full meanings and intended usages for Descriptors cannot be determined without consulting the Alphabetical Display, the only one of the four arrangements containing Scope Notes and complete cross-reference structures. NEVER use any one of the three secondary arrangements for direct indexing or searching! ALWAYS check the Alphabetical Display before using any Descriptor! Indexers must remember that the integrity of the Thesaurus, and the equivalence between a particular Descriptor and its postings, are fundamental to effective retrieval. NEVER use a Descriptor in a sense that violates its intended meaning! ALWAYS check RIE and CIJE to see how a Descriptor has been used, if (for whatever reason) the intended meaning of a term cannot be determined by consulting the Alphabetical Display. Let the central lexicographic staff at the Facility know when Descriptor misuse is discovered; the Lexicographers will coordinate whatever action is necessary to correct the problem.

a. Alphabetical Display

This is the only *Thesaurus* display that should be used for direct indexing and searching. All valid Descriptors (main terms), invalid Descriptors ("dead" terms), and USE references appear in this display interfiled alphabetically word-by-word at one location. Descriptors are "preferred" (indexable) *Thesaurus* terms, while invalid Descriptors and USE references are "non-preferred." Each type of term is displayed with its complete record, as follows:

- Descriptors (main terms)
  Scope Note (SN), Group Code, Add Date, Postings Count, Used For (UF) references, Narrower Terms (NT), Broader Terms (BT), and Related Terms (RT).

- Invalid Descriptors ("dead" terms)
  Scope Note (SN), Group Code, Add Date, and Postings Count.

- USE References
  (reciprocals of UF references; therefore, no subfields are carried in these records).

Other items of this section fully describe these displays. Please refer to the following:

Descriptor Format	item D.2.d
Invalid "Dead" Descriptors	item D.2.e.(2)
USE References	item D.5

b. Secondary Arrangements

The following three *Thesaurus* display "arrangements" are secondary to the main Alphabetical Display. Each serves as a useful tool in achieving full *Thesaurus* utilization. Their purpose is to provide access to the Alphabetical Display; they should not be used for indexing or searching without consulting the Alphabetical Display.

(1) Rotated Display

The Rotated Display is a permuted alphabetical index of all words that form *Thesaurus* terms. Words in all Descriptors (main terms), invalid

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Descriptors ("dead" terms), and USE references are included. Since each separate word is considered as a filing unit, a term appears in as many locations in this display as it contains separate words, i.e., single-word terms file in one location, two-word terms file in two locations, and so on. Subfiling under any one file point is performed first on the basis of the words to the right of the file point and second, on the basis of the words to the left of the file point. The word order within the term itself is not altered.

```
                      Example:  PRIVATE SCHOOL AID

STUDENT FINANCIAL AID OFFICERS
   PRIVATE SCHOOL AID
            LEGAL AID PROJECTS (1966 1980)  Use LEGAL AID
       PROVINCIAL AID  Use STATE AID
           SCHOOL AID  Use EDUCATIONAL FINANCE
            STATE AID

                  PRIVATE JUNIOR COLLEGES  Use PRIVATE COLLEGES and
                                           TWO YEAR COLLEGES
                  PRIVATE SCHOOL AID
                  PRIVATE SCHOOLS
                  PRIVATE SECTOR
                  PRIVATE UNIVERSITIES  Use PRIVATE COLLEGES
                  PRIVATIZATION

                  SCHOOL AGE DAY CARE
                  SCHOOL AID  Use EDUCATIONAL FINANCE
        NONPUBLIC SCHOOL AID (1972 1980)  Use PRIVATE SCHOOL AID
        PAROCHIAL SCHOOL AID (1972 1980)  Use PAROCHIAL SCHOOLS and
                                          PRIVATE SCHOOL AID
          PRIVATE SCHOOL AID
                  SCHOOL AIDES
```

USE references are clearly distinguished from Descriptors in this display. Invalid Descriptors can be identified by accompanying "life span" notations, e.g., (1966 1980), and by having no USE reference.

The Rotated Display is useful in determining all usages of a particular word in the *Thesaurus*, without respect to its position in a multiword term. The Display tends to group related terms where they may often be separated in the main Alphabetical Display, thus aiding indexers in finding more precise terminology, search analysts in translating their inquiries into the language of the system, and subject analysts in structuring new terms.

(2) Hierarchical Display

The Hierarchical Display depicts families of Descriptors (generic trees) related by the taxonomic concept of "class membership." Complete, two-way visibility is provided for all broader-narrower relationships of every *Thesaurus* Descriptor. Each generic tree is carried to its farthest extreme in both directions. The display files the Descriptors in letter-by-letter order, ignoring spaces between words (this differs from the word-by-word filing used for the *Thesaurus*' main Alphabetical Display).

Two sample generic trees are shown below, one for the term DRAFTING and the other for the term LIBRARY SERVICES. Broader terms (i.e., BTs) are identified by preceding colons and appear above each file point (main entry). Narrower terms (i.e., NTs) are identified by preceding periods and are listed below each file point. Multiple colons or periods indicate successively broader or narrower levels of terms.

```
BT                ::::LIBERAL ARTS
▲                 :::HUMANITIES
|                 ::FINE ARTS
|                 :VISUAL ARTS
|—FILE POINT————►DRAFTING
|                 .ARCHITECTURAL DRAFTING
▼                 .ENGINEERING DRAWING
NT                .TECHNICAL ILLUSTRATION

BT                ::SERVICES
▲                 :INFORMATION SERVICES
|—FILE POINT————►LIBRARY SERVICES
|                 .LIBRARY CIRCULATION
|                 ..INTERLIBRARY LOANS
|                 .LIBRARY EXTENSION
|                 .LIBRARY TECHNICAL PROCESSES
▼                 ..LIBRARY ACQUISITION
NT                ...LIBRARY MATERIAL SELECTION
```

Descriptors having neither BTs nor NTs appear in the display as isolates. Included among these isolates are the "invalid" Descriptors, identified by accompanying "life span" notations, e.g., "(1966 1974)," "(1969 1980)." Invalid Descriptors are the only terms appearing in this display that are not currently used in indexing.

The Hierarchical Display serves as a valuable tool for indexers in their attempts to index documents to the most appropriate level of specificity, and for searchers in their attempts at developing comprehensive search strategies.

See item D.6.e.(2), under "Hierarchical Visibility," for a discussion on the importance of using the Hierarchical Display.

(3) Descriptor Group Display

The Descriptor Group Display places each term in the *Thesaurus*, excluding UFs, into one (and only one) of 41 broad subject categories. Together, these categories or "Descriptor Groups" provide a "table of contents" to the *Thesaurus* and an overview of ERIC's subject coverage. Descriptors are alphabetized word-by-word under each group. The display is provided for browsing and for narrowing down the number of terms to be looked at in given situations. It is meant to provide suggestions and be of general assistance to users, whether indexers, searchers, or lexicographers; but it is not a formal classification scheme and should not be construed as such.

Each Descriptor Group is defined by a Scope Note. The set of 41 Scope Notes is necessary for comparing coverage among the groups and always accompanies (precedes) any distribution of the display. Also, each group is represented in the system by a 3-digit "Group Code."

See item D.3 for the complete Descriptor Group structure, a listing of the Group Codes, further information on the groups' functional applications, and details on how individual Descriptors are assigned to the groups.

c. Frequency of Distribution

Working Copies of the Alphabetical, Rotated, and Hierarchical Displays are produced at least annually for internal use by ERIC staff. Working Copies of the Descriptor Group Display, while not regularly scheduled, are produced as needed. The published or commercial *Thesaurus* includes all four displays and is updated and published at least quadrennially.

C. Descriptor Development

1. Evaluation and Decision Criteria for a New Descriptor

During the course of indexing, indexers become aware of concepts that are not adequately represented in the existing *Thesaurus*. Concepts that are found in documents and journal articles being added to RIE or CIJE, but that are not covered by the *Thesaurus*, are considered "candidate Descriptors."

The following guidelines are provided to aid indexers in determining whether a candidate Descriptor should be added to the *Thesaurus*.

a. Does It Actually Appear in Documents Being Indexed?

★*Important Principle: To be considered for the ERIC Thesaurus, a concept must actually appear in the literature being indexed. It cannot be added, for example, merely to complete the links in a hierarchical chain.*

For instance, the *Thesaurus* contains COLLEGE ENTRANCE EXAMINATIONS as a Narrower Term of TESTS, skipping the potential intermediate term ENTRANCE EXAMINATIONS; nevertheless, ENTRANCE EXAMINATIONS cannot be added as long as all usages of the term either pertain to college-level examinations or overlap considerably with other closely related conceptual areas (e.g., OCCUPATIONAL TESTS) already suitably covered in the *Thesaurus*.

The reason for this rule or constraint is that the existence of unused Descriptors in the *Thesaurus* would misrepresent the content of the database, would result in searches yielding zero hits, and would lead to dissatisfaction among users.

b. Does It Qualify for Descriptor Status or Is It an Identifier?

Highly specific entities, including most proper nouns/noun phrases, are sometimes the subjects of documents. These include:

Geographic Locations
Legislative Titles
Literary/Artistic Titles
Organization Names
Persons
Projects
Test Titles
Trade Names

Called "Identifiers," these entities are allowable index terms, and a special field is provided for them. Identifier indexing is intended to supplement Descriptor indexing, and Identifier use must always be in addition to (rather than in lieu of) Descriptor use.

The almost infinite number of specific entities generally makes them undesirable for inclusion in the tightly controlled vocabulary of the *Thesaurus*. Some, because of "staying power" in the literature, have graduated over time to Descriptor status (e.g., AFRICAN CULTURE, AMERICAN INDIANS, BAYESIAN STATISTICS, CHRISTIANITY, FRENCH, MEXICANS, RUSSIAN), but this phenomenon is the exception to the rule. *Thesaurus* precedence is the indexer's best guide in determining whether a proper noun/noun phrase should be considered as a candidate Descriptor. For instance, terms in the eight categories listed above never qualify for Descriptor status. (See Section VIII (Part 2) for a complete discussion of Identifiers.)

Of course, not all entries in the Identifier field are proper nouns. Any concept working its way into the literature of the field must, as a rule, first be "tried out" as an Identifier. This practice allows a concept to be observed while accumulating usage and/or acceptance among various authors. Frequency of indexing occurrence is always an important consideration in deciding whether to add a new conceptual-type term to the *Thesaurus*.

ERIC uses a "Heavily Posted Identifiers" list to highlight candidate Descriptors and encourage their *Thesaurus* consideration. Appearance in this list serves notice to ERIC Clearinghouse vocabulary coordinators that the terms be given some priority or special attention in vocabulary development work by attempting to elevate them to *Thesaurus* status, either as main term Descriptors or as USE references. Fully titled *Heavily Posted Identifiers that Should Be Considered for the ERIC Thesaurus*, this list came on the scene in 1981 with the advent of the printed *Identifier Authority List* (IAL) and has been updated and released subsequent to each IAL edition since that time. The list is prepared as a total alphabetical list and, again, alphabetically by ERIC Clearinghouse. See **Figure VIII-1-4** for a sample page from each. All terms in this example have 30 or more postings. Carry-overs from earlier lists are flagged with stars, some including an additional diamond symbol indicating only light postings recently.

The list by Clearinghouse is provided as a guide to help focus Clearinghouse decision-making on what terms to work on and which, if any, other Clearinghouses might need to be consulted in developing justifications. No restrictions are implied, however. Anyone can work on any term at any time, providing that others in the network are notified via E-mail, etc., in order to avoid duplication of effort. Submitted terms on the list are redlined, with the submitter noted (checked), by the Facility lexicographic staff, thus providing a convenient status report in between completely revised editions of the list. The ✓AA on the list means submitted by the

SEPTEMBER 1991

HEAVILY POSTED IDENTIFIERS THAT SHOULD BE CONSIDERED FOR THE ERIC THESAURUS

Alphabetical List

IDENTIFIER	POSTINGS	IDENTIFIER	POSTINGS
Aboriginal People ★★	(157)	Avoidance Behavior	(39)
Academic Discourse	(72)	Balance	(34)
Access to Health Care	(41)	Bankruptcy	(34)
Accuracy ★	(94)	Basic Writers	(69)
Active Learning	(44)	Beginning Writing	(75)
Adaptive Behavior Scales	(34)	Behavior Analysis	(42)
Adjunct Questions	(34)	Behavior Management	(55)
Administrator Behavior	(32)	Bereavement	(52)
Adolescent Suicide	(36)	Blackfeet (Tribe)	(31)
Adoptive Parents	(33)	Blame	(30)
Adult Child Relationship	(57)	Blooms Taxonomy ★	(209)
Adult Performance Level ★★ ♦	(75)	Boolean Logic	(40)
Advanced Composition	(39)	Boolean Search Strategy	(43)
Advertisements	(70)	Brain Functions	(42)
Advertising Effectiveness	(62)	Brain Research ★★	(96)
Aesthetic Reading	(43)	Browsing	(38)
Aesthetics	(51)	Bus Drivers	(41)
Affective Domain	(39)	Business Law ★ ♦	(40)
Africans	(36)	Business Role	(35)
Age Bias	(35)	Bylaws ★ ♦	(50)
Aggregation (Data)	(43)	Calendars	(30)
Aleut (Tribe) ★ ♦	(35)	Calibration	(37)
Alpha Coefficient	(32)	Canadian Studies ★ ♦	(54)
Alumni Relations	(33)	Caregiver Role	(37)
Ambulatory Health Care	(46)	Case Management	(71)
Analogical Reasoning	(70)	Categorical Data	(39)
Analogies ★	(97)	Cathode Ray Tubes	(31)
Analogy ★★	(81)	Causal Inferences ★ ♦	(58)
Analytical Chemistry	(37)	Cause Effect Relationship	(36)
Anaphora ★	(62)	Ceremonies	(39)
Angoff Methods	(53)	Change Analysis	(30)
Apache (Tribe) ★ ♦	(42)	Character Education	(40)
Archivists	(31)	Chemicals	(32)
Argumentativeness	(31)	Child Behavior	(74)
Arthritis	(30)	Child Protection	(31)
Asians ★	(62)	Child Protective Services	(31)
Aspect (Verbs)	(39)	Childrens Writing	(163)
Athletic Trainers	(38)	Chinese People ★	(97)
Attitudes toward Disabled	(36)	Choctaw (Tribe) ★ ♦	(42)
Audience Research	(42)	Choice Behavior	(48)
Augmentative Communication Systems	(56)	Class Inclusion	(39)
Australians	(30)	Classical Test Theory	(36)
Authentic Materials	(55)	Clauses	(37)
Author Reader Relationship	(64)	Client Behavior	(30)
Author Text Relationship	(65)	Coaching	(58)
Authority ★★	(88)	Coalitions	(39)
Automobile Industry	(37)	Coastal Zones	(36)

★ Carry-overs from Sep87 list.
★★ Carry-overs from earlier (1985, 1983, 1981) lists.
♦ Carry-overs with fewer than 15 postings since Sep87.

FIGURE VIII-1-4a

SEPTEMBER 1991 – HEAVILY POSTED IDENTIFIERS
BY CLEARINGHOUSE

Listings are based on:
(1) responsibility for highest postings;
and/or
(2) scope area.

Parenthetical notations following Identifiers, e.g., (EA/CE/IR), indicate secondary responsibility.

CE

		Postings
Adult Performance Level ★★ ♦		(75)
Affective Domain (CS/PS)		(39)
Automobile Industry		(37)
Business Law ★ ♦		(40)
Competency Tests (EA/CS/TM)		(40)
Correctional Officers		(35)
Criminal Justice (HE) ★ ♦		(48)
Criminal Justice System (SO/UD)		(38)
Curriculum Management ★ ♦		(46)
Educational Awareness (CS/RC)		(35)
Emergency Medical Services ★ ♦		(48)
Employee Participation		(34)
Employer Surveys (JC) ★★ ♦		(55)
Environmental Health (SE) ★★ ♦		(62)
Exoffenders (CG) ★ ♦		(45)
Fact Sheets (SO/TM/IR)		(92)
Federal Agencies (IR) ★ ♦		(52)
Food Production (SE) ★ ♦		(42)
Formal Education (PS/RC/SO)		(30)
Gardening		(38)
Goal Setting (CG/EA/RC) ★★		(155)
Hands On Experience (SE/IR)		(38)
Hazards (PS)		(45)
Health Delivery Systems (RC/SP)		(32)
Informal Education (SE/PS/SO/IR) ★★		(130)
Learner Centered Instruction (FL/IR)		(35)
Learning Environment (IR/EA/HE/PS) ★★		(91)
Life Planning (CG/RC) ★★ ♦		(60)
Linkage (IR/EA) ★★ ♦		(111)
Multinational Corporations (FL/CS)		(42)
National Longitudinal Surveys (TM/UD)		(36)
Older Workers (CG) ★		(91)
Partnerships (RC/UD) ★	✓AA	(139)
Partnerships in Education(EA/HE)	✓AA	(109)
Preapprenticeship Programs ★★ ♦		(90)
Priorities (EA/PS/RC) ★		(66)
Private Industry Councils ★		(64)
Professional Role (IR/PS) ★		(84)
Reauthorization Legislation ★★		(121)
Recession (SO) ★ ♦		(50)
Resource Utilization (RC) ★ ♦		(49)
Social Security (CG/SO) ★		(156)
Social Security Benefits (CG)		(41)
Stress (Biological) (RC) ★★		(77)
Support Services (RC/PS/IR)		(43)
Temporary Employment (HE)		(38)
Transcription		(39)
Workplace Literacy		(148)

CG

		Postings
Adolescent Suicide (EA)		(36)
Age Bias (CS/PS/UD)		(35)
Avoidance Behavior		(39)
Bereavement		(52)
Blame		(30)
Case Management (EC/PS)		(71)
Client Behavior		(30)
Cognitive Complexity (CS)		(38)
Commitment ★★		(127)
Community Mental Health Centers (RC)		(45)
Computer Assisted Counseling ★		(65)
Computer Assisted Guidance (CE) ★		(53)
Confrontation		(30)
Counseling Psychology ★	✓CG	(155)
Cross Cultural Counseling		(50)
Differentiation (PS/TM)		(45)
Dominant Behavior (PS)		(30)
Emotions		(61)
Euthanasia (EC) ★ ♦		(43)
Faking (Testing) (TM)		(33)
Family Systems Theory		(57)
Family Therapy (PS)		(36)
Gestalt Psychology (CS/SO)		(41)
Halo Effect (TM)		(30)
Happiness (PS) ★		(54)
Hollands Theory of Occupational Choice		(67)
Homophobia	✓AA	(30)
Honesty (CS/EA/PS)		(37)
Housework (CE/PS)		(39)
Identity Formation ★		(88)
Individuation (PS)		(34)
Information Analysis (CE/IR) ★★ ♦		(49)
Informed Consent (HE)		(57)
Job Stress (EA/CE) ★ ♦		(49)
Life Cycles (CE) ★★		(86)
Life Expectancy (SO)		(33)
Life Transitions		(40)
Loss		(41)
Machiavellianism (CS)		(35)
Maslows Hierarchy of Needs (CE/EA/RC) ★ ♦		(50)
Meaningfulness (PS)		(34)

★ Carry-overs from Sep87 list.
★★ Carry-overs from earlier (1985, 1983, 1981) lists.
♦ Carry-overs with fewer than 15 postings since Sep87.

FIGURE VIII-1-4b

ERIC Facility; the ✓CG means submitted by the ERIC Clearinghouse on Counseling and Personnel Services.

See item D.6.e.(4) of this section, "Rule of Specificity," for more discussion on concept-type Identifiers and when they should be added to the *Thesaurus*.

c. Is It Useful?

Candidate Descriptors should be evaluated on the basis of their usefulness in communication, indexing, and retrieval. In general, the utility of terms can be estimated by considering the relative frequency of their occurrence in the literature; the relative frequency of their previous indexing use as Identifiers; their proximity in meaning to existing Descriptors; their technical precision and acceptability in the field; their transience, stability, and "staying power." These factors are interdependent and must often be considered together.

d. Is It a Synonym?

An especially important consideration in recommending a candidate Descriptor is its closeness in meaning to terms already in the *Thesaurus*. To prevent unwarranted scattering of similar information, terms having certain close relationships should be considered synonyms, i.e., synonymous from the practical point of view of retrieval.

This guideline encompasses many near- or quasi-synonymous terms that would not be considered as synonyms in ordinary contexts. Fine distinctions based on dictionary definitions are not important if they do not hold up from the point of view of searching. The following examples illustrate groups of terms that may be considered synonyms for the purposes of retrieval.

● CITY SCHOOLS URBAN SCHOOLS	(Pairs of "pure" synonyms.)
CLASSIFICATION CATEGORIZATION	
SIGHT VISION	
● ACADEMIC ACHIEVEMENT ACADEMIC PERFORMANCE	(Usage is indistinguishable in the literature.)
ADMINISTRATION MANAGEMENT	
● COLLEGE FACULTY COLLEGE TEACHERS	("Faculty" is technically broader than "teachers"; yet, "faculty" is the accepted term used in the literature, as well as in "real life," for postsecondary instructional staff.)

● DROPOUTS SCHOOL DROPOUTS EARLY SCHOOL LEAVERS	(For purposes of efficient retrieval, "dropouts" and "school dropouts" are considered synonymous; "early school leavers" is the British equivalent of the U.S. "school dropouts.")
● CAREER CHANGE EMPLOYMENT CHANGE JOB CHANGE OCCUPATIONAL CHANGE VOCATIONAL CHANGE WORK CHANGE	(Subtle distinctions among these terms might be made, but it is difficult to imagine a search query that should not use all of them. USE references in the Rotated Display are helpful in discovering synonymous relationships; for instance, see the word "job(s)" in the Rotated Display and how it leads to each of the other near-synonyms shown at left.)
● PHYSICAL DISABILITIES PHYSICALLY DISABLED TYPEWRITING TYPISTS	(Distinctions between "person" terms and corresponding "condition" or "function" terms often cannot be realistically teased apart in indexing.)
● MATURITY IMMATURITY NUTRITION MALNUTRITION	(Terms at opposite ends of conceptual continuums should be treated as synonyms when it is unrealistic to consider dealing with one without the other.)
● WELDING ARC WELDING GAS WELDING	(The example shows a broad term followed by two narrower terms in an area peripheral to the educational disciplines and to the interests of the ERIC system. These terms may be treated as synonyms because of their low usage level.)

Once it has been decided to consider two or more terms as synonyms for purposes of indexing and retrieval, one term must be chosen as the preferred term and entered as a Descriptor. The alternative "non-preferred" term(s) are entered as USE references (see item D.5).

Some nearly synonymous pairs or groups of terms in the ERIC *Thesaurus* are not treated as synonyms (i.e., preferred and non-preferred) because of a real need to retrieve the concepts separately. These are terms in core areas of immediate interest to the educational community and include such pairs as:

- ADVANTAGED and DISADVANTAGED;
- COLLEGES and UNIVERSITIES;
- GUIDANCE and COUNSELING.

When this situation occurs, the two terms must be cross-referenced, and Scope Notes must generally be written that will permit indexers and searchers to distinguish the terms and use them consistently.

e. How Should It Be Structured as a Candidate Descriptor?

All subject concepts not adequately covered by existing Descriptors and not "true," proper-noun type Identifiers should be evaluated as "potential" *Thesaurus* terms. Potential terms that are evaluated as synonyms to existing Descriptors should be added as UFs to those Descriptors (see item D.5 of this section). If synonymity is ruled out, potential terms are considered as "candidate Descriptors" and must be "scoped" (defined) then "fitted" into the structure of the *Thesaurus*. The mechanism for submitting candidate Descriptors (and all *Thesaurus* changes) is the "Vocabulary Development Form," discussed fully in item "E" below. As an indexer completes the form (either manually or via a computer template), a number of significant points should be kept in mind:

(1) Ambiguity

Ambiguity in terminology, created by such factors as near synonyms, homographs, differences in spelling, word forms, and hierarchical treatment, is a barrier to effective communication. In preparing a new term for the *Thesaurus*, the avoidance of ambiguity should be a first consideration. Ambiguous terminology leads to inconsistent indexing and irrelevant search output.

Ambiguity can usually be avoided by preparing clear, precise Scope Notes indicating how terms should be used. Parenthetical qualifiers, e.g., INEQUALITY (MATHEMATICS), SECURITY (PSYCHOLOGY), are particularly helpful in preventing term misuse.

(2) Specialization

Each area of educational technology usually develops its own specialized vocabulary or jargon to express the concepts peculiar to its own interests. Analysis of these specialized vocabularies reveals that many of the terms thought by a particular specialty perhaps to be unique are actually identical to (or closely related to) terms used in other areas of technology. Moreover, it is quite common for technologists in one area to borrow terms from another and to use them for their own purposes. As an example, the term "Transformation Theory" is used in both the fields of linguistics and mathematics to refer to highly different concepts. Indexers must be aware of the fact that a candidate Descriptor within their Clearinghouse's scope of interest may have other meanings in other fields. The acceptability of a term can be researched by consulting dictionaries, encyclopedias, handbooks, and other authoritative reference materials. (See item C.2 in this section.)

If a term is suspected of having multiple meanings, the Clearinghouses whose "scopes" cover the various meanings should be consulted. Each Clearinghouse has a Vocabulary Coordinator to whom questions on vocabulary matters may be directed. Throughout the Descriptor appraisal and generation process, these Vocabulary Coordinators, as well as the central lexicographic staff at the ERIC Facility, should be considered resource persons that the indexer can contact whenever necessary for advice and information.

(3) Appearance in Other Thesauri

Terminological consistency among thesauri is a desirable goal, and the vocabulary precedents established by other thesauri and subject heading lists are followed by ERIC whenever practicable. If a candidate Descriptor is included in reputable existing thesauri as a main, indexable term (i.e., not as a USE reference), then the chances are that the concept is an acceptable one. Nevertheless, it must be carefully ascertained that the structure, parenthetical qualifier, and Scope Note for the term being used as a precedent do not conflict with the intended use within ERIC.

The following list includes the principal thesauri and subject heading lists used in ERIC lexicographic analysis. The first three thesauri (items #1-3) and their respective databases (Australian Education Index, British Education Index, and Canadian Education Index) are intertwined with ERIC in a long-term cooperative initiative called International ERIC (informally, InterEd).

1. *Australian Thesaurus of Education Descriptors*. Prepared by G.B. Lavender and M.A. Findlay. Australian Council for Educational Research Limited, Hawthorn, Victoria, Australia.
2. *British Education Thesaurus*. Leeds University Press, Leeds, U.K.
3. *Canadian Education Thesaurus* (bilingual French & English). Micromedia Limited, Toronto, ON.
4. *Child Abuse and Neglect Thesaurus*. National Center on Child Abuse and Neglect, Washington, DC.
5. *Computer Database Thesaurus & Dictionary*. Information Access Company, Foster City, CA.
6. *CRS Thesaurus/Legislative Indexing Vocabulary*. Library of Congress, Congressional Research Service, Washington, DC.
7. *European Education Thesaurus* (formerly EUDISED Thesaurus---available in the nine official languages of the European Community). Office for Official Publications of the European Communities, Luxembourg.
8. *ILO Thesaurus*. International Labour Office, Geneva, Switzerland.
9. *INSPEC Thesaurus*. Institution of Electrical Engineers. INSPEC/IEEE Service Center, Piscataway, NJ.
10. *Library of Congress Subject Headings*. 3 vols. Washington, DC.
11. *Medical Subject Headings* (MeSH). 3 vols. National Library of Medicine, Bethesda, MD.

12. *NASA Thesaurus*. National Aeronautics and Space Administration, Washington, DC.
13. *National Criminal Justice Thesaurus*. National Institute of Justice/NCJRS, Rockville, MD.
14. *Nursing & Allied Health (CINAHL) Subject Heading List*. CINAHL Corporation, Glendale, CA.
15. *PAIS Subject Headings*. Public Affairs Information Service, Inc., New York, NY.
16. *SPINES Thesaurus* (English/Multilingual edition). 2 vols. UNESCO, Paris, France.
17. *SPORT Thesaurus*. Sport Information Resource Centre, Gloucester, ON.
18. *Thesaurus of Aging Terminology*. American Association of Retired Persons, Washington, DC.
19. *Thesaurus of Engineering and Scientific Terms* (TEST). Office of Naval Research (Project LEX), Washington, DC.
20. *Thesaurus of Psychological Index Terms*. American Psychological Association, PsycINFO User Services, Arlington, VA.
21. *Thesaurus of Sociological Indexing Terms*. Sociological Abstracts, Inc., San Diego, CA.
22. *UNESCO Thesaurus*. 2 vols. Compiled by Jean Aitchison. UNESCO, Paris, France.
23. *UNESCO:IBE Education Thesaurus*. UNESCO, Paris, France.
24. *A Women's Thesaurus*. Edited by Mary Ellen S. Capek. Harper & Row, Publishers, Inc., Hagerstown, MD.

(4) Previous Indexing

Some new *Thesaurus* terms require historical references to previous indexing practices in their Scope Notes. This occurs in two specific situations:

- When a new term was previously a UF.

In this case, the following kind of note is added to the Scope Note field, after the definition, or alone if no definition appears:

(NOTE: PRIOR to Month & Year, e.g., Mar80 , THE INSTRUCTION " New Term , USE old USE reference " WAS CARRIED IN THE THESAURUS)

- When a new term was not a UF, but was previously represented by some other term(s) not obvious from the new term's display. Examples are:

(NOTE: PRIOR to Month & Year, e.g., May81 , " term xyz " WAS FREQUENTLY USED TO INDEX THIS CONCEPT)

(NOTE: PRIOR to Month & Year, e.g., Dec89 , THIS CONCEPT WAS INDEXED UNDER " term xyz ")

Such notes are usually not necessary when a new term has a BT (broader term), i.e., has an "obvious" place to go to gather previous postings.

Also, these notes would not be needed if the previous postings were light enough to permit reindexing or if there were Identifier postings that could be transferred. (See the emphasis ERIC places on reposting under item "E," "Vocabulary Development Form.")

(5) **Rules**

The indexer generating a candidate Descriptor recommendation should be thoroughly familiar with the *Rules and Conventions for Descriptors* (item "D" of this section) before attempting to complete the Vocabulary Development Form. These rules contain detailed information on the characteristics of ERIC Descriptors and on the cross-references, Scope Notes, and other data that make up Descriptor displays. The rules should be applied equally by both the generator of the *Thesaurus* recommendation and the lexicographer acting on it.

2. The Research Process

Indexers or users wanting to add or change something in the ERIC *Thesaurus* often ask "Where do I start?" and "What do I do when I get there?" This section will attempt to answer these basic questions.

a. Identifiers

(1) Using Them

Subject index terms evolve in ERIC from Identifier status to Descriptor (*Thesaurus*) status as they are posted to document and journal article citations to describe subject content. They will not evolve and will languish, however, if they are not posted when they should be. Clearinghouses need to appreciate and understand Identifier functions and applications and not be reluctant to use these terms. Certain categories of Identifiers should always be indexed if they represent document subject matter; these are listed under "Identifiers," in the *Indexing Reminders* section of the *ERIC Indexing Handbook (Clearinghouse Indexing Practices)*, **Appendix C** of the EPM. Indexers should familiarize themselves with these reminders and try to apply them consistently.

(2) Keeping a Clearinghouse List

Each Clearinghouse needs to maintain a list of new Identifiers, not yet in the IAL but used in indexing, for all indexers in the Clearinghouse to share. Each Clearinghouse Vocabulary Coordinator should keep a term file of definitions, synonyms, etc., found in incoming/inprocess documents for use in future Descriptor consideration and justification.

b. "Heavily Posted Identifiers" List

If the question is which term to work on, the best place to look first is the "Heavily Posted Identifiers" list discussed in item C.1.b of this section and illustrated in **Figure VIII-1-4**. Terms appearing on this list have been "prioritized" by the Facility lexicographic staff as needing in some way to be represented in the *Thesaurus* vocabulary, either as main terms or as USE references. A new list is created with each new edition of the *Identifier Authority List* (IAL). The particular list shown in **Figure VIII-1-4** was restricted to terms with 30 or more postings. "Heavily Posted Identifiers" are displayed in two ways: one permutation lists all of the terms alphabetically, while the other sorts the terms Clearinghouse-by-Clearinghouse based on scope area and/or responsibility for highest postings. Although arranged by Clearinghouse, anyone in the ERIC network can work on any of the terms at any time. The only preliminary activity that is needed is to notify the rest of the network of one's intentions; this can be done by transmitting the list of terms being worked on to the ERIC Vocabulary Review Group (use of E-mail for this purpose is recommended). The Facility lexicographic staff periodically updates the Heavily Posted Identifiers list by redlining terms received and acted upon, and indicating responsible Clearinghouses; this serves as an activity/status report for the network.

c. Vocabulary Tools

Before indexers begin Descriptor (*Thesaurus*) development activity, it is helpful to have available a basic collection of dictionaries and thesauri with which to consult. The minimum, general collection recommended by the Facility lexicographic staff is listed in **Figure VIII-1-5**. (A variety of dictionaries is necessary in order to have at one's disposal all possible meanings of a term, and the available multiplicity of interpretations given those meanings by diverse lexicographers.)

d. VDF Form -- Templates

ERIC *Thesaurus* additions and changes have various lexicographic criteria and format characteristics that the ERIC computer system will accept. These elements have been built into the ERIC Vocabulary Development Form (VDF) (see **item E** of this section), and indexers preparing for vocabulary development work should either have a stack of paper VDFs on hand or the form on a template that can be copied and used again and again on their microcomputers. See **Figure VIII-1-8** for a paper VDF (filled-in example). See **Figure VIII-1-9a** for a VDF microcomputer template and **Figure VIII-1-9b** for an example of what that template might look like when completed. Paper VDFs are obtained from the ERIC Facility lexicographic staff. For anyone needing a blank VDF template, the one illustrated in **Figure VIII-1-9a** is available in WordPerfect 5.1 format from the ERIC Facility. Two additional

LEXICOGRAPHIC AUTHORITIES

Dictionaries

Webster's Ninth New Collegiate Dictionary. Springfield, MA: Merriam-Webster Inc.
American Heritage Dictionary, College Ed. Boston: Houghton Mifflin.
Random House Webster's College Dictionary. New York: Random House.
Oxford American Dictionary. New York: Oxford Univ Press.
An unabridged dictionary.

Thesauri

Thesaurus of Psychological Index Terms (6th ed). Washington: American Psychological Association, 1991. $65 ($49 for members of the APA).
APA, Order Department, P.O. Box 2710, Hyattsville, MD 20784. (800) 336-4980.

Thesaurus of Sociological Indexing Terms (2d ed). San Diego: Sociological Abstracts Inc., 1989. $62.
SocAbs, P.O. Box 22206, San Diego, CA 92122.

Loo, Shirley, ed. CRS Thesaurus/Legislative Indexing Vocabulary (19th ed). Washington: Congressional Research Service, 1990.
Library Services Div., CRS, Library of Congress, Washington, DC 20540. (Free, but hard to obtain directly; CRS advises requesting via your Congressperson.) (CRS/Education Microthesaurus available also.)

National Criminal Justice Thesaurus. Rockville, MD: National Institute of Justice, 1990. Call for price [1989 ed was $25 (U.S.)].
National Institute of Justice/NCJRS, Department F, P.O. Box 6000, Rockville, MD 20850. (301) 251-5500.

Capek, Mary Ellen S., ed. A Women's Thesaurus. New York: Harper & Row, 1987. $37.50 + $2 shipping.
Harper & Row, Publishers, Inc., Mail Order Dept., P.O. Box 350, Hagerstown, MD 21741.

British Education Thesaurus (1st ed). Leeds, U.K.: Leeds University Press, 1988. 45 pounds (check newspaper for USD). (2d ed due out in Oct91.)
Leeds University Press, Univ. of Leeds, Leeds LS2 9JT, UNITED KINGDOM.

NASA Thesaurus (1988 ed). Washington: National Aeronautics and Space Administration. Vol. 1, Hierarchical Listing--$40. Vol. 2, Access Vocabulary--$20. Vol. 3, Definitions--$15.
Available from: National Technical Information Service, Dept. of Commerce, 5285 Port Royal Road, Springfield, VA 22161.

Medical Subject Headings, MeSH (1992). Bethesda, MD: National Library of Medicine. Annotated Alphabetic List--$40 (PB92-100031). Tree Structures--$35 (PB92-100049). Permuted Medical Subject Headings--$31 (PB92-100056).
Available from: National Technical Information Service (address above); prices are for U.S., Canada, and Mexico.

SPINES Thesaurus (English/Multilingual 1988 edition of the 1984 revision). Paris, France: UNESCO. Over 11,000 science and technology terms with multilingual cross-references (SPINES is an acronym for "Science and Technology Policy Information Exchange System"). $57 for two volumes: Vol. 1, Alphabetical List; Vol. 2, List of Int'l Organizations & Projects, Thematic List, Permuted List, French/Spanish/Portuguese to English Lists.
Available from: UNIPUB, 4611-F Assembly Drive, Lanham, MD 20706-4391. (301) 459-7666.

FIGURE VIII-1-5: LEXICOGRAPHIC AUTHORITIES (MINIMUM COLLECTION)

examples of what completed VDF templates might look like are shown in **Attachment #2** of this section.

e. **Precedence**

It is accepted practice that indexers and lexicographers should look for and generally follow the precedents laid down by those who came before them. For example, the ERIC *Thesaurus* and IAL favor PROGRAMING over PROGRAMMING, CATALOGING over CATALOGUING, DIALOG over DIALOGUE.

f. **Expedience (or "Two for the Price of One")**

When working on one term, references to others will be seen or will come to mind. Often it is beneficial in terms of time and effort to work on several at the same time.

RECENTLY COMPLETED THESAURUS RECOMMENDATIONS	-->	OTHER TERM(S) COMPLETED AT THE SAME TIME	
CAREER INFORMATION SYSTEMS	-->	RT	JOB BANKS
RESISTANCE (PSYCHOLOGY)	-->	NTs	RESISTANCE TO CHANGE RESISTANCE TO TEMPTATION
UF Accents (Vocal Stress)	-->	UF	Accents (Dialects)
TROUBLESHOOTING	-->	NT	DEBUGGING (COMPUTERS)

Thus, for instance, in researching TROUBLESHOOTING above, the indexer/lexicographer encountered sufficient documents and other information on DEBUGGING, to make defining and structuring two terms no more demanding than doing one.

g. ***Five Easy Steps* for *Thesaurus* Recommendations**

The steps numbered 1-5 below are the tasks needed to complete most Descriptor additions and changes.

(1) **Scope Notes**

The first thing a Descriptor or *Thesaurus* term usually needs is a definition so that indexers and users will understand how the term is used or will be used. Other database thesauri (see **Figure VIII-1-5** and item B.6 of this section) should be checked to see how they define and use a term; definitions can be borrowed "as is," without attribution. Care should be taken to ensure that plural Scope Notes are used for plural terms and singular Scope Notes for singular terms.

Dictionaries and glossaries should also be checked if they are relevant to the context of the term being researched (i.e., likely to have the term). The ERIC database itself should be searched, titles examined from the printouts, and appropriate documents selected for detailed examination usually via microfiche. Definitions selected or culled from the actual ERIC literature are usually more meaningful and comprehensive than those found in dictionaries. Much of this work will have already been done, however, if one has remembered to document the term as it was indexed on new accessions (see item C.2.a.(2), "Keeping a Clearinghouse List," above).

Definitions found should be keyed or written out one by one (with authority titles noted before or after each). Three definitions from three authorities (ERIC documents are accepted as authorities) should be the minimum number considered. But one should not get carried away! Definition data beyond what normally would fit on a page of 12-point type is probably excessive. The idea is to get several definitions from different authorities that can be examined as one package, and from which a final definition or Scope Note can be synthesized. All syntheses, from the first attempt to the final version, may be accumulated, providing a record of the processes one goes through in defining a term. Such documentation is useful to the final term-recommendation package submitted to the Facility lexicographic staff.

Care should be taken to parenthetically qualify a term that is ambiguous, e.g., SYMPTOMS without qualification is too broad. It is also helpful for terms that are defined restrictively to give the *Thesaurus* user somewhere else to go, e.g.:

RESTRICTIVE SCOPE NOTE DEFINITIONS	ALTERNATIVES GIVEN IN PARENTHETICAL INDEXING NOTE (OF SCOPE NOTE)
DEFENSE MECHANISMS -- Intrapsychic strategies used by individuals to avoid or confront unreasonable or undesirable impulses, feelings, or ideas	(Note: For physiological or zoological defense mechanisms, use "Defense Reactions (Physiology)" or "Animal Defenses" as Identifiers)
PAIN -- Distress and suffering caused by injury or disease of the body	(Note: Do not use for emotional pain, for which see the Identifier "Emotional Distress")
DEPENDENCY (PERSONALITY) -- Reliance on other persons or things for comfort and support	(Note: Do not use for drug or economic dependence, for which see DRUG ADDICTION or the Identifier "Dependency (Economics)")

Additionally, the Scope Note may need to advise indexers and users of indexable Identifiers in addition to available Descriptors. For example, the Scope Note for PAIN advises "see also Identifiers "Low Back Pain," "Pain Control," and "Pain Tolerance" -- this reminds indexers of Identifiers in addition to the most specific available Descriptor and searchers of additional available retrieval terms.

(See rules and conventions for **Scope Notes**, item D.4 of this section.)

(2) **UF/USE Terms**

These become more apparent as a term is analyzed and scrutinized in the course of the vocabulary development process. UFs should be documented when encountered in the literature and, when readied for *Thesaurus* input, should each be searched free-text in ERIC to reveal additional variations. Scattered or inconstant Identifier forms provide many clues. Providing that the ERIC criteria are met, the most commonly used form would normally be picked as the main *Thesaurus* term.

(See rules and conventions for **UF/USE References**, item D.5 of this section.)

(3) **BTs/NTs (Hierarchical / Generic Structuring)**

Properly placing a term in its proper *Thesaurus* hierarchy is not especially complicated if one remembers to compare similar or parallel terms' hierarchies (e.g., HOMICIDE/SUICIDE generic trees) and to find the best fit therein. Indexers should evaluate potential hierarchical placements all the way up the hierarchy. For example, PRIVATE SECTOR might look suitable initially as an NT in the display of ECONOMICS, but ECONOMICS is an NT of LIBERAL ARTS, and it is obvious from looking at the total LIBERAL ARTS hierarchy (in the *Thesaurus* Hierarchical Display) that PRIVATE SECTOR does not belong there.

(See rules and conventions for **Narrower Terms/Broader Terms**, item D.6 of this section.)

(4) **RTs (Related Terms) / Group Code**

Related Terms (RTs) can be collected in the database search part of the vocabulary development exercise, described in item C.2.g.(5) immediately below (as opposed to the authority search (Scope Note) part described in item C.2.g.(1) above). The Descriptors indexed on the accessions retrieved in the search of a given term should be looked at accession-by-accession and the ones recorded that appear to be closely related to the term in question. The recorded terms should be alphabetized, then evaluated in the context of each of their reciprocal displays. Frequency of concurrent occurrences is a possible relatedness gauge. NTs of a single BT are often RTs of each other (e.g., MOODS/ANXIETY/MORALE are NTs of the BT PSYCHOLOGICAL PATTERNS and RTs of each other). Proliferation of RTs can usually be avoided if one avoids the redundancy of carrying both general/broader and specific/narrower terms (e.g., *not* carrying FAIR USE (COPYRIGHTS) in the displays of FILMS, PUBLICATIONS, and PLAGIARISM when the general term COPYRIGHTS is already there).

By noting the Group Codes of the various terms considered as possible cross-references, one will arrive at a reasonably good idea of the appropriate Descriptor Group for a term by the time cross-referencing has been completed.

(See rules and conventions for **Related Terms** and **Descriptor**

Groups, items D.7 and D.3 of this section, respectively.)

(5) **Backfile**

The back of the Vocabulary Development Form asks for two impact statements regarding each Thesaurus transaction, i.e., (1) Impact on the Thesaurus, and (2) Impact on the Database. The "Impact on Thesaurus" block is intended as a reminder to always consider the "terminology terrain" encompassing a given concept. Preparers use the space provided to include information that will support or justify their recommendation. The Facility lexicographic staff generally copies data word-for-word from this block for use in the Vocabulary Status Report, disseminated to the ERIC Vocabulary Review Group. The block can be left blank. Contrived, "pat" phrases such as "this term is a rapidly growing concept, important to the field supported by this Clearinghouse," which carry no substantive information, should be excluded.

Indexers and other preparers of the Vocabulary Development Form frequently approach the "Impact on Database" block with more trepidation than any other element on the form. This is because the decision on how much to search is often subjective, based on a conception of what "typical" users might want or need. Preparers must put themselves in the place of the users, searching as comprehensively (as far back in time) as judged to be reasonable and practical for the user group members. ★Searches should consider Identifier hits first, followed by searches of titles, full-text (abstract, etc.)/latest years, and full-text/other years, in that order. Also, vocabulary searching is usually more cost-effective if done using a CD-ROM system. The complete full set of citations found can first be winnowed down considerably by removing those having one or more of the Identifiers selected for transfer (and listed on the VDF form). Upon achieving the set of citations after "notting out" the Identifiers, a CD-ROM system can be used to page down through the full records one-by-one. The preparer should mark on the computer or on paper those to be posted major or minor while "Xing out" any that are not relevant. As the exercise progresses, additional Identifiers for transfer will be identified. A list of potential RTs should be made from the index terms in each record (see item on "RTs/Group Code" above).

(Note: Because most proposed Descriptors worked on by Clearinghouse staff are within that particular Clearinghouse's scope area, vocabulary development searching usually replicates existing, inhouse searching done as part of user services. Any new searches that are required should ordinarily still be appropriate for inclusion in the Clearinghouses' collections of convenient "search saves.")

Thesaurus changes, like new terms, are recommended and entered using the Vocabulary Development Form. Preparers should input only the part of a term display that needs to be changed. It is helpful to avoid minor format changes like DOWNS SYNDROME --> DOWN SYNDROME, LIMITED ENGLISH SPEAKING --> LIMITED ENGLISH PROFICIENT, where alternatives and originals are alphabetically adjacent, until such time as the entire ERIC file can be made consistent via a reload.

h. Other Reminders

Proposed new or modified Descriptor displays are always documented on the Vocabulary Development Form. In addition to the basic recommendation itself, each form submitted to the ERIC Facility for *Thesaurus* consideration generally should include the following:

(a) Back of Form

i) 3+ authorities (definitions or Thesaurus displays);
ii) Identifier list (terms to be transferred to Descriptors);
iii) Accession number list with major/minor distinctions (excludes accessions posted by Identifiers in above list).

(b) Computer search

i) Search strategy;
ii) Typed/Printed Records -- may be marked up with the preparer's major/minor designations, explanatory notations, etc.; may be submitted on floppy disks (3½- or 5¼-inch); printouts of unedited records, particularly of those using previously listed Identifiers (from "Identifier List," item ii above), normally should not be sent to the Facility.

(c) Copies of pages from ERIC documents and specialized dictionaries, containing definitions or other explanatory materials (copying of standard dictionary pages is unnecessary).

D. Rules and Conventions for Descriptors

1. General

The rules and conventions that follow have been designed to help ERIC indexers and lexicographers make consistent decisions relating to the addition and modification of terms in the *Thesaurus of ERIC Descriptors*. They are based on two earlier ERIC publications:

- ED 033 740---*Rules for Thesaurus Preparation*, 2nd edition. September 1969. Prepared by the Panel on Educational Terminology (PET)[*], U.S. Office of Education.
- ED 188 621---*VIP Manual: Guidelines and Procedures for ERIC Vocabulary Development*. December 1978. Prepared by Barbara Booth, first coordinator of the 1977-80 ERIC Vocabulary Improvement Project (VIP).[*]

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[*] For more discussion, see the **Attachment #1** to this section, History of the Thesaurus of ERIC Descriptors.

Rules for Descriptor selection and construction are covered below under "Main Terms." This is followed by detailed discussions of each of the parts of main term displays, including "Descriptor Group" codes, "Scope Notes" or term definitions, and cross-references. Cross-references include Used For/USE References, Broader/Narrower Terms, and Related Terms.

These rules must be adhered to in the completion of the Vocabulary Development Form (see item "E" of this section). The rules follow the standards of practice advocated by the *American National Standard Guidelines for the Construction, Format, and Maintenance of Monolingual Thesauri* (ANSI/NISO Z39.19-199x).[**]

2. Main Terms

a. General

The concepts "main term" and "Descriptor" are equivalent when used in the sense of controlled thesaurus vocabularies. Main terms are the preferred, postable terms in a thesaurus; they are used to index and search (i.e., describe and retrieve), in a consistent manner, the subject content of documents entered in an information system.

Any information retrieval Thesaurus will also contain "non-preferred" synonyms or quasi-synonyms, included to provide alternative pathways to the main terms or Descriptors. In ERIC, these are referred to as "USE references."

The following discussion focuses on the selection and construction of ERIC "Descriptors." See item D.5 of this section for details on "USE references."

b. Descriptor Selection

A Descriptor is any single or multiword term that appears in the *Thesaurus* and that may be used for indexing a document or journal article. Rules for selecting Descriptors are as follows:

(1) Appearance in Literature

★*Descriptors should represent important concepts actually found in the literature of the database (as contrasted with concepts arrived at theoretically, independent of the literature).* They should also reflect the actual language used in the literature to express such concepts.

(2) Acceptability to ERIC Users

Descriptors selected should have an agreed-upon meaning and should be acceptable terminology for relevant user groups. The judgment of acceptability will involve decisions as to obsolescence, negative connotations, colloquialness, and other factors.

Acceptability must be considered in terms of the wide-ranging scope of

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[**] Proposed 1990 revision of ANSI Z39.19-1980. Developed by the National Information Standards Organization (NISO); circulated 1/10/90 among NISO voting members for comment.

education and its highly diversified user community. Care should be taken to avoid parochial points of view. Compromise may be necessary when the terminology needs of separate areas of specialization are in conflict. (See also rule "(6)" under "Descriptor Construction" below.)

(3) Usage Frequency

Frequency of occurrence is a factor in establishing Descriptors. Records should therefore be kept of the number of times candidate terms have been used in indexing and/or searching.

NOTE: As a general rule of thumb, concepts should be considered candidate Descriptors after 5 usages as Identifiers and should be included somewhere in the structured *Thesaurus* vocabulary (either as Main or USE terms) after approximately 10 usages. Excluded from this rule are, of course, those Identifiers representing very specific entities that cannot qualify for Descriptor status (e.g., names of organizations, projects, people, specific equipment, geographic locations, etc.).

(4) Multiword Descriptors

Multiword Descriptors (bound terms, precoordinated terms, and others) should be used whenever single-word Descriptors cannot describe concepts adequately. Many problems of this type can be solved by the careful application of rule "(1)" above. The following points should be considered:

- Use of a multiword Descriptor is justified if any of the individual words in the multiword Descriptor could combine with other Descriptors so as to produce frequent false coordinations.

  Example: STUDENTS
  TEACHERS
  ATTITUDES
  STUDENT ATTITUDES
  TEACHER ATTITUDES

- Use of a multiword Descriptor is justified if the individual words of that multiword term are also unique Descriptors that, when coordinated with each other, would retrieve concepts different from that retrieved by the multiword term.

  Example: STUDENTS
  TEACHERS
  STUDENT TEACHERS

- If a single-word term is so general as to be virtually useless in manual searching (e.g., SCHOOLS), consider linking that term with another term (e.g., SECONDARY SCHOOLS).

(See also rule "(7)" under "Descriptor Construction" below.)

c. Descriptor Construction

(1) Word Form

Descriptors are limited to nouns and noun phrases; however, these include nouns derived from verbs and adjectives.

DISADVANTAGED	(from adjective)
DROPOUTS	(from verb + adverb)
PROBLEM SOLVING	(from verb + object)
STUDENT EVALUATION OF TEACHER PERFORMANCE	(noun phrase)

(2) Singular vs. Plural

In choosing between singular and plural noun forms, the precedents of the ERIC *Thesaurus* (based on long-established rules of major indexing and subject cataloging operations) should be followed:

- The plural form should be used for "count nouns"---things or entities about which one asks "how many?," e.g.,

  COMPUTERS
  OCCUPATIONS
  PROGRAMS
  SKILLS
  STUDENTS
  VISUAL IMPAIRMENTS

- The singular form should be used for "mass nouns"---nouns about which one asks "how much?" This includes those nouns derived from verbs and adjectives that represent processes, attributes or properties, and conditions, e.g.,

  ABILITY
  ACHIEVEMENT
  BACKGROUND
  DELINQUENCY
  EVALUATION
  LEADERSHIP
  REGIONAL PLANNING
  TIME

- Common usage should be followed for term types not covered by these general rules, e.g.,

  DEMOCRACY not DEMOCRACIES

(3) Length

Descriptors are limited to 50 characters, including blanks.

(4) Character Limitations

Allowable characters are limited to the letters A-Z, the Arabic numerals 0-9, and parentheses ().

(5) Letters First

A Descriptor should not begin with a numeral, e.g.,

GRADE 4 not 4th GRADE

(6) Parenthetical Qualifiers

Parentheses may be used for two purposes, i.e.,

- Homographs

  If a Descriptor is judged to be a homograph, it must have a parenthetical qualifier, e.g., DEPRESSION (PSYCHOLOGY), DEPRESSION (ECONOMICS).

  The parenthetical qualifier is considered an integral part of the Descriptor, and both homograph and qualifier are used together in indexing and searching.

  For any given homograph, there may exist as many Descriptors consisting of homograph plus parenthetical qualifier as there are unique indexable meanings for that homograph.

  Caution: Do not use another homograph as a parenthetical qualifier, e.g.,

  GRADES (SCHOLASTIC) not GRADES (MARKS)

- Invalid Descriptors

  Invalid Descriptors ("dead" terms) are qualified with notations indicating their "life span," e.g., LABORATORY TECHNIQUES (1967 1980), SECURITY (1967 1978).

  Life span qualifiers are integral parts of invalid Descriptors, and their presence precludes further indexing use of such Descriptors.

  (See discussion on "Former Main Terms" below, item "e".)

(7) Natural Word Order

Multiword Descriptors should reflect direct, natural word order, as found in the literature.

ADULT EDUCATION not EDUCATION OF ADULTS
FREEDOM OF SPEECH not SPEECH (FREEDOM OF)

Do not use inverted entries.

BEHAVIORAL OBJECTIVES not OBJECTIVES, BEHAVIORAL

One of the reasons for restricting the use of parenthetical qualifiers to homographs and invalid Descriptors is to preclude the use of inverted entries. All words in the *Thesaurus*, whatever their position in the Descriptor, are accessible through the Rotated Display, thereby making inverted entries unnecessary. (See item B.7.b.(1).)

(8) Abbreviations and Acronyms

Abbreviations and acronyms are inherently ambiguous and should generally be avoided as Descriptors. Exceptions to this rule are acronyms that have replaced their spelled-out versions in common discourse, either nearly (e.g., FLES) or totally (e.g., LASERS). Most acronyms that appear in the *Thesaurus* are non-indexable USE references (e.g., ETV, Use EDUCATIONAL TELEVISION).

(9) Sex Neutral Terminology

Sex neutral Descriptors are preferred when a concept is intended to refer to both sexes, e.g.,

CRAFT WORKERS	not	CRAFTSMEN
ENLISTED PERSONNEL	not	ENLISTED MEN
HOMEMAKERS	not	HOUSEWIVES
LAY PEOPLE	not	LAYMEN
LABOR NEEDS	not	MANPOWER NEEDS
SEAFARERS	not	SEAMEN
NEEDLEWORKERS	not	SEAMSTRESSES

Preference of sex neutral language does not preclude the creation of legitimate population terms such as EMPLOYED WOMEN, FATHERS, WOMEN FACULTY, etc. Terminology of this nature is necessary when such specific population groups are the frequent subjects of documents.

d. Descriptor Format

(1) Structure (Alphabetical Display)

The structure of a typical Descriptor in the main Alphabetical Display (Working Copy) is illustrated in **Figure VIII-1-6**.

(2) Capitalization

Although **Figure VIII-1-6** shows upper and lower case letters, the *Thesaurus* file is actually in all upper case, and the *Thesaurus* Working Copy used by ERIC indexers appears in all upper case. Indexers are required to transcribe terms in their Working Copies to the upper/lower case format of RIE/CIJE records---initial capital letters for all words, excluding prepositions, articles, and conjunctions when they are not the first word (e.g., Reduction in Force, In State Students).

The published *Thesaurus* editions appear in upper/lower case; these are programmatic conversions (done by the publisher) of the all upper case

DESCRIPTOR **(Main Term)**		COMMUNICATIONS 710	**GROUP CODE**
ADD DATE		JUL66 (2,781)	**POSTINGS COUNT**
SCOPE NOTE	SN	Science and technology of the transmission and reception of information (Note: prior to Mar80, the Thesaurus carried the instructions, "Communication Networks, Services, or Systems, USE Telecommunication")	**Usage Definition** **Prior Indexing Note**
USED FOR	UF	Communications Networks	
		Communications Services	
		Communications Systems	
		Mass Media Technology #	**Multiple Use Reference for Coordination of Two (or More) Terms**
		Media Technology (1968 1980)	**Former Descriptor Used from 1968 to 1980**
NARROWER TERM	NT	Audiovisual Communications	
		Telecommunications	
BROADER TERM	BT	Technology	
RELATED TERM	RT	Cybernetics	
		Delivery Systems	
		Distributive Education	
		Hypermedia	
		Information Networks	
		Information Processing	
		Information Technology	
		Information Theory	
		Information Transfer	
		Interactive Video	
		Mass Media	
		Network Analysis	
		Networks	
		Nonprint Media	
		Propaganda	
		Publications	
		Publicity	
		Social Networks	

Three USE Reference reciprocals of the five USED FOR terms listed above	Communications Systems Use COMMUNICATIONS
	Mass Media Technology Use COMMUNICATIONS and MASS MEDIA
	Media Technology (1968 1980) Use COMMUNICATIONS

FIGURE VIII-1-6: SAMPLE *THESAURUS* ENTRY

Thesaurus master file.

(3) Alphabetization

Alphabetization of the main Alphabetical Display is word-by-word according to the following sequence:

Left Parenthesis;
Letters in Usual Order;
Numerals in Usual Order.

Word-by-word ordering (corresponding to the subject indexes of RIE and CIJE) began in 1980, as a conversion from letter-by-letter alphabetization.

(4) Group Codes

The 3-digit Group Code is used to place a particular Descriptor in one of 41 Descriptor Groups. These groups are broad subject categories that provide an overview of the *Thesaurus* vocabulary. They can be used for general browsing or for searching. For more information, see item D.3 of this section.

(5) Add Dates

An Add (entry) Date, e.g., APR90, accompanies each Descriptor in the main Alphabetical Display. Add Dates are assigned programmatically at the time a term enters the *Thesaurus* file. The earliest "real" Add Date is AUG68. Month and year of entry are given for each Descriptor added from AUG68 to the present. All Descriptors entered earlier than AUG68 have been given the arbitrary Add Date of JUL66, the approximate point in time at which ERIC indexing began.

Add Dates are intended to help users in the preparation of search strategies. They represent calendar dates, not RIE or CIJE issue dates. Rigid interpretation of Add Dates should be avoided. A given addition may not show up in RIE or CIJE for up to 6 months after its Add Date. Also, because of backfile corrections, Descriptors may sometimes be seen on accessions that are earlier than the Add Dates of these same Descriptors. Additionally, postings of Descriptors carrying JUL66 may not actually go back that far in time, or may be earlier if applied to one of the original, pre-RIE historical collections (Disadvantaged, OE Research Reports 1956-65, etc.).

(6) Postings Counts

As an additional aid to users, the Alphabetical Display provides a Postings Count for each Descriptor. This notation indicates the number of times the term has been used as either a major or minor Descriptor in ERIC indexing. It appears on the second line of the Descriptor display and above the Scope Note. In the Working Copy, it is to the right of the Add Date and within parentheses, and shows total ERIC postings for the term at the time the particular issue was produced. In the published *Thesaurus*, separate postings counts are given for CIJE and RIE.

Examination of the postings for a Descriptor may lead the user to check the term's cross-references. For example, a term with 3,000 postings cannot be searched easily manually, but one or more of its Narrower Terms (NTs) might well be. On the other hand, a term with only 15 postings might suggest that the searcher also consider including the term's Related Terms (RTs) or even its Broader Terms (BTs) in the search strategy.

All terms in the *Thesaurus* have actually been used in indexing. Any terms showing zero postings were in the process of being re-posted as that particular *Thesaurus* edition went to press, and will show their true postings in subsequent issues.

(7) Scope Notes

Descriptor Scope Notes (SNs) give definitions and/or usage restrictions, and often provide special instructions for indexers and searchers. For a complete discussion of Scope Notes (their roles, how they are developed, how to interpret them, etc.), see item D.4 of this section.

(8) Cross-References

At least one of the following types of cross-references accompanies every Descriptor in the *Thesaurus*' Alphabetical Display. See items as indicated (in this section) for complete details about each type.

- UF (Used For)/USE References----item D.5.
- Narrower Terms/Broader Terms----item D.6.
- Related Terms----item D.7.

(9) *Thesaurus* Displays

In addition to the main Alphabetical Display, three additional displays of the *Thesaurus* are provided to assist in indexing and searching. These are the Rotated Display, Hierarchical Display, and Descriptor Group Display. See this section's item B.7 for a discussion of each.

e. Former Main Terms

Former indexable Descriptors are identified in the *Thesaurus* by parenthetical "life span" notations, e.g., "(1982 1990)." These notations show the period of time in which the terms were used in indexing.

These terms fall into categories "(1)" and "(2)" below. A third category "(3)" no longer appears in the *Thesaurus*.

(1) "Transferred" Descriptors

These are former main terms that have been downgraded to the status of USE references, e.g.,

Personal Relationship (1966 1974)
  Use INTERPERSONAL RELATIONSHIP

Physics Teachers (1967 1980)
  Use PHYSICS
  and SCIENCE TEACHERS

These notations indicate that the postings of the first term in each set were "transferred" to the other term(s), i.e., the terms were merged in order to facilitate retrieval. The reason for merging the first set was to consolidate the postings of two synonyms under a single preferred form. The reason for merging the second set was to eliminate a term that had been used infrequently (and somewhat inconsistently).

Reasons for transferring or merging Descriptors, other than the need to collapse synonyms (or near-synonyms) and low-posted terms, include replacement of obsolete, ambiguous, or incorrect terminology. All transactions of this nature are made only to facilitate retrieval, a fact that must be demonstrated before such changes are approved.

Parenthetical life span notations inform users of older manual indexes and computer files that they must use these former terms to achieve complete retrieval. The major database vendors at times have updated their ERIC files to reflect postings "transfers," and users of these services in most instances need only to search currently active Descriptors to obtain records posted originally by the transferred terms. Postings transfers of approximately 840 Descriptors before December 1980 (when the last complete reload of ERIC by all major vendors occurred) are reflected in the ERIC database, and these Descriptors no longer need to be considered in online or other computer searching. Transfers after December 1980, however, have not been fully implemented in the ERIC vendor files, and both old and new versions of a term must be used in retrospective searching. All "transferred" ERIC Descriptors that are still searchable are listed in commercially published editions of the ERIC *Thesaurus* (see "Transferred Descriptors" in the Table of Contents).

(See also "Transferred Descriptors" discussion under "UF (Used For)/USE References," item D.5 of this section.)

(2) Invalid "Dead" Descriptors

Occasionally, Descriptors have appeared in the *Thesaurus* file that, because of inherent ambiguity or subsequent indexing practices, are used so inconsistently that their utility in retrieval is seriously diminished. Such Descriptors, when discovered, are converted to invalid or "dead" terms.

Invalid Descriptors have the same display format as active Descriptors except for having no cross-references (no UFs, NTs, BTs, RTs). More important, however, are two additional identifying characteristics: a "life span" notation indicating the span of time the term was actually in use, and a Scope Note indicating how the term was used and leading indexers and searchers to more precise or meaningful terminology.

Example: SPATIAL RELATIONSHIP (1966 1980) 920
Mar80 (254)
SN Invalid Descriptor---Used for both the spatial relationship among areas of a facility and the spatial orientation of individuals---See the Descriptors "Spatial Relationship (Facilities)," "Spatial Ability," and "Personal Space" for these concepts

Invalid Descriptors have the same main-entry form as Descriptors that have been downgraded to UF status; however, there is a significant difference between the two. Former Descriptors shown in the *Thesaurus* as UFs have been, or are in the process of being, deleted from the ERIC computer files, i.e., their postings have been (or will be) "transferred" to the preferred USE term(s). (For the present status of these terms, see the "Transferred Descriptors" section of the published ERIC *Thesaurus*.) On the other hand, invalid Descriptors remain in the ERIC files, and a comprehensive computer search of subjects represented by invalid Descriptors would necessitate their inclusion in one's search strategy. (For a complete list of invalid Descriptors, see the "Invalid ('Dead') Descriptors" section of the published ERIC *Thesaurus*.)

A major objective of the ERIC system is the maintenance of synchronous authority and index (postings) files. Most former main terms can be automatically reposted to one or more active Descriptors. Invalid Descriptors, however, cannot be handled in this manner. The inconsistency of their postings makes invalid Descriptors what they are. "Dead term" status effectively puts a hold on a concept, preventing its further use in indexing and allowing it to be set aside for possible manual reindexing (i.e., individual examination and reindexing of original records) at a later date. As time and funds permit, invalid Descriptors are reposted to preferred, active terms.

(See also discussion on "Ambiguous Usage" under "Scope Notes," item D.4 of this section.)

(3) Deleted Descriptors

This third category of former main terms refers to concepts that have been totally removed from the *Thesaurus* file. The total number of terms in this group is quite small as compared to the other two categories, comprising no more than 30 Descriptors since ERIC became fully operational in 1966. These terms may be characterized by one of the following descriptions:

- Little-used ambiguous terms that encompass no appreciable subject content, e.g., ADVANCED SYSTEMS, LIMITED EXPERIENCE.

  (These have been purged from the ERIC database and are no longer searchable; they may, however, be seen in older printed indexes.)

- Little-used highly specific terms whose existence cannot be justified because there is little or no data in ERIC on the subjects they represent, e.g., BIRACIAL GOVERNMENT, CABINET TYPE PROJECTORS.

(Like the first type, these also have been purged and are no longer searchable.)

- Highly specific proper nouns or coined terminology that more appropriately should be posted in the Identifier field, e.g., CHAUTAUQUAS.

(Though no longer in the *Thesaurus*, such terms are legitimate Identifiers and may be searched---see "Identifiers," Section VIII (Part 2).)

3. Descriptor Groups

The ERIC *Thesaurus*, like many other information retrieval thesauri (particularly those that cover fields as broad as "education"), incorporates a system of broad subject categories into which all Descriptors are grouped. These "Descriptor Groups" essentially represent a "table of contents" to the *Thesaurus* and provide an overview of the subject coverage of the ERIC system. Descriptor Groups provide easy initial access to the *Thesaurus* and are particularly useful to new or infrequent ERIC indexers and searchers who need to quickly obtain a basic familiarity with the total ERIC vocabulary. Descriptor Groups can also be helpful to the more experienced user in providing a means of narrowing down the total number of terms to be looked at, whether the task is indexing, searching, or lexicographic analysis.

The current ERIC Descriptor Groups are listed in **Figure VIII-1-7**; each group is identified by a unique 3-digit code.

This set of 41 Descriptor Groups was developed during the 1977-80 Vocabulary Improvement Project and first appeared in the 8th published edition of the *Thesaurus* (Completely Revised, 1980). A previous set of 52 groups (developed in the late 1960s) appeared in earlier published *Thesaurus* editions. There was much overlap between the earlier groups and the *Thesaurus* hierarchies. One of the purposes of the revision was to eliminate, as much as possible, this unnecessary hierarchical reiteration.

The Descriptor Group section of the published *Thesaurus* includes a Scope Note for each group, indicating subject coverage and including cross-references to other closely related groups. This is followed by a "Descriptor Group Display" in which the terms are listed alphabetically within each group.

The Descriptor Groups are represented by the series of 3-digit codes shown in **Figure VIII-1-7**. Each *Thesaurus* Descriptor has one of these codes in its record. The Alphabetical Display carries this code and serves as an index or key to the groups.

Groups Related to LEARNING AND DEVELOPMENT

110	LEARNING AND PERCEPTION
120	INDIVIDUAL DEVELOPMENT AND CHARACTERISTICS

Groups Related to PHYSICAL AND MENTAL CONDITIONS

210	HEALTH AND SAFETY
220	DISABILITIES
230	MENTAL HEALTH
240	COUNSELING

Groups Related to EDUCATIONAL PROCESSES AND STRUCTURES

310	THE EDUCATIONAL PROCESS: CLASSROOM PERSPECTIVES
320	THE EDUCATIONAL PROCESS: SCHOOL PERSPECTIVES
330	THE EDUCATIONAL PROCESS: SOCIETAL PERSPECTIVES
340	EDUCATIONAL LEVELS, DEGREES, AND ORGANIZATIONS
350	CURRICULUM ORGANIZATION
360	STUDENTS, TEACHERS, SCHOOL PERSONNEL

Groups Related to CURRICULUM AREAS

400	SUBJECTS OF INSTRUCTION
410	AGRICULTURE AND NATURAL RESOURCES
420	ARTS
430	HUMANITIES
440	LANGUAGES
450	LANGUAGE AND SPEECH
460	READING
470	PHYSICAL EDUCATION AND RECREATION
480	MATHEMATICS
490	SCIENCE AND TECHNOLOGY

Groups Related to HUMAN SOCIETY

510	THE INDIVIDUAL IN SOCIAL CONTEXT
520	SOCIAL PROCESSES AND STRUCTURES
530	SOCIAL PROBLEMS
540	BIAS AND EQUITY
550	HUMAN GEOGRAPHY
560	PEOPLES AND CULTURES

Groups Related to SOCIAL/ECONOMIC ENTERPRISE

610	GOVERNMENT AND POLITICS
620	ECONOMICS AND FINANCE
630	LABOR AND EMPLOYMENT
640	OCCUPATIONS
650	BUSINESS, COMMERCE, AND INDUSTRY

Groups Related to INFORMATION AND COMMUNICATIONS

710	INFORMATION/COMMUNICATIONS SYSTEMS
720	COMMUNICATIONS MEDIA
730	PUBLICATION/DOCUMENT TYPES

Groups Related to MEASUREMENT AND RESEARCH

810	RESEARCH AND THEORY
820	MEASUREMENT
830	TESTS AND SCALES

Groups Related to FACILITIES AND EQUIPMENT

910	EQUIPMENT
920	FACILITIES

FIGURE VIII-1-7: DESCRIPTOR GROUPS

Example:

Alphabetical Display		Descriptor Group Display
ADULT LEARNING	110	110
JUL66	(1,822)	LEARNING AND PERCEPTION
BT Learning		
RT Adult Development		Ability Identification
Adult Education		Abstract Reasoning
Adult Programs		Adult Learning
Adult Students		Arousal Patterns
Adults		Associative Learning
Andragogy		Attention
Lifelong Learning		Attention Control
		Audience Response
		Auditory Discrimination
		Auditory Perception
		Auditor[illegible]imuli
		Aural [illegible]ing
		Beh[illegible]ni

The Descriptor Groups have had many roles in the past. At one time, the journal article citations in CIJE were arranged by Descriptor Groups. Several users have reported the utility of the groups in organizing various files, cataloging systems, awareness profiles, etc. Also, for a time, one of the online database vendors included Group Codes as an ERIC search option, allowing retrieval of all documents posted by a group's terms or subsets of those terms, and coordination of an entire group with single *Thesaurus* terms.

While sometimes helpful in the refinement of computer searches, Descriptor Groups are basically a tool for manual browsing, and users should be cautioned not to construe them as a formal classification scheme. Document indexing and search request formulation should never be based on Descriptor Groups alone. Before accurate decisions can be made on the use of individual Descriptors, they must be seen in the context of their hierarchies (the Hierarchical Display *is* a classified arrangement) and of the main Alphabetical Display with its Scope Notes and cross-references.

Individual Descriptors may often be conceptually broader than their group assignments might imply. For example, terms that have been scoped to include subject matter both within and outside of the education field may be found in "Groups Related to Educational Processes and Structures." Such group assignments are based on the way the terms are most frequently used in ERIC indexing.

Each term in the *Thesaurus*, excluding UFs, is assigned to one Descriptor Group and to only one. However, many terms would admittedly appear to warrant assignment to more than one group. This situation is generally most apparent among closely related, conceptually overlapping Descriptor Groups (the groups are not mutually exclusive). The problem is currently handled with "see" and "see also" cross-references in the Scope Notes of the Descriptor Groups. Multiple-group assignments, while a possibility, are not planned for the immediate future. Such a capability would probably be most helpful when using the Descriptor Groups for searching, but more evidence of the day-to-day operational utility of the groups for this purpose is required.

The following guidelines are provided for selecting the one proper Descriptor Group for a given Descriptor:

- Group assignment should be made on the basis of the Descriptor's relationship to the entire field of education, rather than to a specialty (such as a particular Clearinghouse's subject area).

- Consult the Descriptor Group Display to determine:

    --- The assignment of similar, parallel, comparable, or analogous concepts.

    -- The assignment of terms that will be cross-referenced in the display of the Descriptor in question.

- Keep in mind that Descriptor Groups are adjuncts to other *Thesaurus* structures and displays. In evaluating whether a given term would be better in one group or another, consider its impact in each context. For instance, is CULTURE FAIR TESTS more illuminating or valuable to someone scanning the BIAS AND EQUITY group or the TESTS AND SCALES group? In this case, CULTURE FAIR TESTS is already displayed together with the other "test" terms in the Rotated Display, in the Hierarchical Display under TESTS, and in the main Alphabetical Display as a direct NT of TESTS. Assigning it to BIAS AND EQUITY provides a new view of this term.

- Use the guidance provided by the Descriptor Group Scope Notes. For instance, the Scope Note of the EQUIPMENT group says "see DISABILITIES for special equipment serving the handicapped," and one may find in this latter group such terms as HEARING AIDS and WHEELCHAIRS. The Scope Note of the OCCUPATIONS group specifically refers the user to a number of more precise groups, including HEALTH AND SAFETY, where terms such as NURSES and PHARMACISTS may be found.

Once the choice of the most appropriate Descriptor Group has been made for a given term, the 3-digit Group Code for that group is then entered along with the term and its display using the Vocabulary Development Form. (See **Figure VIII-1-8** of this section.)

4. Scope Notes

a. General

A Scope Note is a brief statement (370 character limit, including intervening blanks) of the intended usage of a Descriptor. It may be used to clarify an ambiguous term or to restrict the usage of a term.

Scope Notes may include all alphabetical, numerical, and special characters within the limits of ERIC character availability, except for the semicolon (;). The semicolon is used in ERIC as a subfield delimiter.

Scope Notes may be definitional, instructional, or both. As definitions, Scope Notes define terms for the purposes of their use in ERIC indexing. In a broader

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sense, definitional Scope Notes are, therefore, guides to what will be retrieved by searching on a Descriptor.

Instructional Scope Notes direct the user to other terms (Descriptors and/or Identifiers), indicate proper coordinations, provide historical notes on changes in usage or reference structure, or otherwise guide and explain preferred usage for both indexing and retrieval.

b. Definitional Scope Notes

Definitional Scope Notes are used in the *Thesaurus* for the following categories of Descriptors:

- Fundamental concepts appearing both by themselves and as components of precoordinated Descriptors.

ABILITY

SN THE DEGREE OF ACTUAL POWER PRESENT IN AN ORGANISM OR SYSTEM TO PERFORM A GIVEN PHYSICAL OR MENTAL ACT (NOTE: USE A MORE SPECIFIC TERM IF POSSIBLE)

CHANGE

SN ACT OR PROCESS OF ALTERING, MODIFYING, TRANSFORMING, SUBSTITUTING, OR OTHERWISE MAKING OR BECOMING DIFFERENT -- INCLUDES DEVIATION FROM ESTABLISHED CHARACTER, CONDITION, SEQUENCE, OR DIRECTION (NOTE: DO NOT CONFUSE WITH "DEVELOPMENT," WHICH REFERS TO SEQUENTIAL, PROGRESSIVE CHANGES -- USE A MORE SPECIFIC TERM IF POSSIBLE)

- Homographs.

FREE SCHOOLS

SN ALTERNATIVE SCHOOLS OFFERING A COMPLETELY VOLUNTARISTIC FRAMEWORK, INCLUDING AN UNSTRUCTURED CURRICULUM AND A SPONTANEOUS LEARNING ENVIRONMENT -- STUDENTS ARE FREE TO SELECT WHAT TO LEARN, WITH WHOM, WHEN, AND HOW -- GRADES, COMPETITION, AND COMPARISONS BETWEEN INDIVIDUALS ARE DISCARDED (NOTE: DO NOT CONFUSE WITH "FREE EDUCATION" OR "FREEDOM SCHOOLS")

- Descriptors containing words that may be ambiguous in some contexts.

LANGUAGE HANDICAPS

SN RECEPTIVE OR EXPRESSIVE LANGUAGE DISABILITIES (NOTE: USE "LEARNING DISABILITIES" IF THE DISABILITY IS BEING CONSIDERED IN AN EDUCATIONAL SETTING -- USE "SPEECH HANDICAPS" FOR IMPAIRMENTS OF THE PERIPHERAL SPEECH MECHANISMS)

SATELLITE FACILITIES

SN SUBSIDIARY FACILITIES THAT MAY BE SOME DISTANCE FROM THE FACILITY OR INSTITUTION TO WHICH THEY ARE ADMINISTRATIVELY RELATED

- Descriptors that include words that experience with the "terminology terrain" of education has shown are near-synonyms.

HUMAN RESOURCES

SN PEOPLE WHO CAN BE DRAWN UPON FOR THEIR KNOWLEDGE, SKILLS, OR PRODUCTIVE CAPACITIES (NOTE: DO NOT CONFUSE WITH "HUMAN CAPITAL")

INDIVIDUALIZED EDUCATION PROGRAMS

SN EDUCATIONAL PROGRAMS FOR INDIVIDUAL STUDENTS, EACH GEARED TO THE PARTICULAR STUDENT'S NEEDS AND CONDUCTED IN ACCORDANCE WITH A WRITTEN PLAN AGREED ON BETWEEN THE STUDENT (AND/OR PARENTS) AND SCHOOL OFFICIALS -- IEP'S WERE ORIGINALLY CONCEIVED FOR USE IN EDUCATING HANDICAPPED CHILDREN AND WERE GRADUALLY EXPANDED TO INCLUDE ALL SPECIAL NEEDS GROUPS

- Terms that have a specialized, uncommon meaning in ERIC usage.

LABORATORY TRAINING

SN METHOD OF TRAINING DESIGNED TO FACILITATE SELF INSIGHT, PROCESS AWARENESS, INTERPERSONAL COMPETENCE, AND DYNAMICS OF CHANGE

MAINSTREAMING

SN PROGRESSIVELY INCLUDING AND MAINTAINING EXCEPTIONAL STUDENTS (DISABLED OR GIFTED) IN CLASSES AND SCHOOLS WITH REGULAR OR NORMAL STUDENTS, WITH STEPS TAKEN TO SEE THAT SPECIAL NEEDS ARE SATISFIED WITHIN THIS ARRANGEMENT

- Terms generally not used in common discourse (even if commonly used in the literature).

NEONATES

SN AGED BIRTH TO APPROXIMATELY 1 MONTH (NOTE: ADDED MAR89 TO LIST OF AGE LEVELING DESCRIPTORS -- PRIOR TO THAT, THIS CONCEPT WAS FREQUENTLY INDEXED BY "INFANTS")

SOCIOMETRIC TECHNIQUES

SN PROCEDURES USED TO IDENTIFY THE PREFERENCES, LIKES, OR DISLIKES OF THE MEMBERS OF A GROUP WITH RESPECT TO EACH OTHER, AS WELL AS TO IDENTIFY VARIOUS PATTERNS OF GROUP STRUCTURE OR INTERACTION

- Technical terms (even if commonly known among the relevant subject experts).

GENERATIVE PHONOLOGY

SN THEORY OR SYSTEM OF RULES WHICH DESCRIBES OR PREDICTS WELL-FORMED PHONOLOGICAL OUTPUTS, AND IS USED TO EXPRESS THE ABILITY OF SPEAKERS TO PRODUCE THE SOUNDS OF THEIR NATIVE LANGUAGE

MISCUE ANALYSIS

SN EXAMINATION AND INTERPRETATION OF OBSERVED RESPONSES IN ORAL READING WHICH DO NOT MATCH EXPECTED RESPONSES, AS A TECHNIQUE FOR MEASURING THE LEARNER'S CONTROL OF THE READING PROCESS

- Terms requiring historical notes, instructions for coordination with or reference to other Descriptors or Identifiers, or otherwise requiring explanation of usage.

ACCESSIBILITY (FOR DISABLED)

SN CHARACTERISTICS OF FACILITIES, PROGRAMS, AND SERVICES THAT ALLOW THEM TO BE ENTERED OR USED BY INDIVIDUALS DESPITE VISUAL, HEARING, MOBILITY, OR OTHER IMPAIRMENTS (NOTE: FOR PHYSICAL ACCESS, COORDINATE WITH "PHYSICAL MOBILITY" OR "VISUALLY HANDICAPPED MOBILITY" -- PRIOR TO JUN80, SEE ALSO "ARCHITECTURAL BARRIERS")

FUND RAISING

SN IDENTIFYING, SOLICITING, ACQUIRING, AND CULTIVATING FINANCIAL RESOURCES (NOTE: PRIOR TO FEB78, THE INSTRUCTION "FUND RAISING, USE FINANCIAL SUPPORT" WAS CARRIED IN THE THESAURUS)

RELATIONSHIP

SN TYPE OR MODE OF ASSOCIATION BETWEEN OR AMONG PHYSICALLY EXISTING ENTITIES, E.G., PEOPLE, INSTITUTIONS, OBJECTS (NOTE: USE A MORE SPECIFIC TERM IF POSSIBLE -- DO NOT CONFUSE WITH "CORRELATION" -- PRIOR TO MAR80, THE USE OF THIS TERM WAS NOT RESTRICTED BY A SCOPE NOTE)

SOCIAL WELFARE (1966 1980)

SN INVALID DESCRIPTOR -- USED FOR WELL-BEING AND VARIOUS TYPES OF SOCIAL SERVICES -- USE "WELL BEING" FOR FORMER CONCEPT, "WELFARE SERVICES" FOR ORGANIZED ASSISTANCE TO THE DISADVANTAGED, AND "SOCIAL SERVICES" OR OTHER APPROPRIATE TERMS FOR SOCIAL SERVICES PROVIDED TO THE GENERAL POPULATION

c. Instructional Scope Notes

Instructional Scope Notes are best illustrated by providing a series of examples of their major types.

(1) "USE ANOTHER TERM..."

CAREER OPPORTUNITIES (1966 1980)

SN INVALID DESCRIPTOR -- USED INCONSISTENTLY IN INDEXING -- USE "CAREERS," AND, IF APPROPRIATE, "EMPLOYMENT OPPORTUNITIES"

EDUCATIONAL FINANCE

SN ANY ASPECT OF RAISING AND SPENDING REVENUE FOR EDUCATIONAL PURPOSES (NOTE: USE A MORE PRECISE TERM IF POSSIBLE)

(the phrase "use a more precise term if possible" is used when advising the indexer to use a less general term even though no specific Narrower Terms are cited)

ORAL READING

SN THE ACT OF READING ALOUD, OFTEN USED TO DEVELOP OR TEST READING SKILLS (NOTE: USE "READING ALOUD TO OTHERS" WHEN THE PURPOSE OF ORAL READING IS TO INFORM OR ENTERTAIN A LISTENER OR GROUP OF LISTENERS)

PROBLEMS

SN DIFFICULTIES OR OBSTACLES NOT EASILY OVERCOME (NOTE: USE A MORE SPECIFIC TERM IF POSSIBLE)

(the phrase "use a more specific term if possible" is used when advising use of a Narrower Term)

SATELLITES (AEROSPACE)

SN (NOTE: IF APPLICABLE, USE THE MORE SPECIFIC TERM "COMMUNICATIONS SATELLITES")

(i.e., don't overlook the one Narrower Term that's available)

(2) "SEE..., SEE ALSO..., FOR...SEE"

INTERNATIONAL STUDIES

SN MULTIDISCIPLINARY FIELD OF INQUIRY CONCERNED WITH ANALYZING SOCIAL PHENOMENA THAT OCCUR WITHIN, BETWEEN, AND TRANSCENDING NATIONALLY ORGANIZED POLITICS -- COMMONLY IDENTIFIED SUBFIELDS ARE "INTERNATIONAL POLITICS," "FOREIGN POLICY," "INTERNATIONAL LAW," "INTERNATIONAL ORGANIZATION," "INTERNATIONAL ECONOMICS," AND "COMPARATIVE AREA STUDIES"

(reference is made to other subject areas without citing specific Descriptors)

INVENTIONS

SN ORIGINAL PRODUCTS OR PROCESSES (THINGS NOT PREVIOUSLY EXISTING) DEVELOPED BY CREATIVE THOUGHT OR EXPERIMENTATION -- (NOTE: FOR "DISCOVERIES," SEE THE DESCRIPTOR "DISCOVERY PROCESSES")

PHARMACY

SN THE ART OR PRACTICE OF PREPARING, PRESERVING, COMPOUNDING, AND DISPENSING DRUGS (NOTE: SEE ALSO "PHARMACOLOGY")

PRESSURE (1970 1980)

SN INVALID DESCRIPTOR -- ORIGINALLY INTENDED AS A PHYSICAL SCIENCE TERM BUT USED INCONSISTENTLY FOR SOCIAL PRESSURE, PSYCHOLOGICAL STRESS, ETC., AS WELL AS PHYSICAL PRESSURE -- SEE SUCH DESCRIPTORS AS "PRESSURE (PHYSICS)," "POLITICAL INFLUENCES," "SOCIAL INFLUENCES," AND "STRESS VARIABLES"

UNCOMMONLY TAUGHT LANGUAGES

SN LANGUAGES NOT GENERALLY OFFERED FOR INSTRUCTION IN THE UNITED STATES EDUCATIONAL SYSTEM (NOTE: ALSO SEE THE SPECIFIC LANGUAGE, E.G., TURKISH, OR THE LANGUAGE FAMILY, E.G., URALIC ALTAIC LANGUAGES)

(3) "SEE ALSO...[IDENTIFIER]"

EQUIVALENCY TESTS

SN TESTS TO MEASURE THE EXTENT TO WHICH PREVIOUS SCHOOLING, KNOWLEDGE, OR EXPERIENCE SATISFIES COURSE OR JOB REQUIREMENTS (NOTE: SEE ALSO THE IDENTIFIER "GENERAL EDUCATIONAL DEVELOPMENT TESTS" -- PRIOR TO SEP77 AND MAR80 RESPECTIVELY, THE INSTRUCTIONS "GED TESTS, USE EQUIVALENCY TESTS" AND "PROFICIENCY EXAMINATIONS, USE EQUIVALENCY TESTS" WERE CARRIED IN THE THESAURUS)

(4) "COORDINATE WITH..., COORDINATE OTHER TERMS..., USE WITH..., COORDINATE WITH [IDENTIFIERS]"

FOREIGN CULTURE

SN CULTURE REGARDED AS FOREIGN FROM THE PERSPECTIVE OF THE DOCUMENT OR JOURNAL ARTICLE (NOTE: USE MAJOR GEOGRAPHIC IDENTIFIERS TO IDENTIFY THE FOREIGN CULTURE, AND MINOR GEOGRAPHIC IDENTIFIERS TO IDENTIFY THE NATIVE CULTURE -- PRIOR TO MAR80, THIS TERM WAS NOT RESTRICTED BY A SCOPE NOTE AND CARRIED NO SPECIAL INSTRUCTION)

HEARINGS

SN SESSIONS IN WHICH WITNESSES ARE HEARD AND TESTIMONY IS RECORDED (NOTE: FOR U.S. CONGRESSIONAL HEARINGS, COORDINATE "HEARINGS" WITH SUCH IDENTIFIERS AS "CONGRESS," "CONGRESS 95th," ETC.)

LANGUAGE TESTS

SN TESTS TO MEASURE PROFICIENCY, DIAGNOSE STRENGTHS AND WEAKNESSES, OR PREDICT FUTURE PERFORMANCE IN A NATIVE OR FOREIGN LANGUAGE (NOTE: FOR FOREIGN LANGUAGE TESTS, COORDINATE THIS TERM WITH "SECOND LANGUAGE LEARNING," AND, WHEN APPROPRIATE, THE LANGUAGE)

MEDICAL RECORD ADMINISTRATORS

SN INDIVIDUALS WHO PLAN, DEVELOP, AND ADMINISTER MEDICAL RECORD SYSTEMS FOR HOSPITALS, CLINICS, HEALTH CENTERS, ETC. (NOTE: FOR LIBRARIANS IN MEDICAL LIBRARIES, COORDINATE "LIBRARIANS" AND "MEDICAL LIBRARIES" -- FOR LIBRARIANS WHO ARE DIRECTLY INVOLVED IN PATIENT CARE, USE THE IDENTIFIER "CLINICAL MEDICAL LIBRARIANS")

(5) "USE FOR..."

SEX FAIRNESS

SN THE CORRECTION OF SEX BIAS OR DISCRIMINATION (NOTE: USE FOR DESCRIPTIONS OF MATERIALS, PROCEDURES, ACTIVITIES, OR PROGRAMS THAT TREAT THE SEXES EQUITABLY)

(6) "DO NOT USE FOR..."

READING DIFFICULTIES

SN PROBLEMS IN READING, CAUSED EITHER BY DISABILITIES ASSOCIATED WITH PSYCHOLOGICAL PROCESSES OR BY SUCH FACTORS AS PHYSICAL OR SENSORY HANDICAPS, CULTURAL BACKGROUND, LOW ABILITY, ETC. (NOTE: DO NOT USE FOR "READABILITY" -- THE PREVIOUS TERM "READING DIFFICULTY" WAS NOT SCOPED AND WAS OFTEN CONFUSED WITH "READABILITY")

(7) "DO NOT CONFUSE WITH..."

PROGRAM DEVELOPMENT

SN PROCESS OF FORMULATING A SCHEME, DEVISING PROCEDURES, OR PLANNING ACTIVITIES WITH REGARD TO SPECIFIC PROGRAM OBJECTIVES (NOTE: DO NOT CONFUSE WITH "PROGRAM DESIGN" OR "PROGRAM IMPLEMENTATION" -- PRIOR TO MAR80, THE USE OF THIS TERM WAS NOT RESTRICTED BY A SCOPE NOTE)

(8) "SEE.../USE..." Other Sections of the *Thesaurus*

CATALOGS

SN (NOTE: USE A MORE SPECIFIC TERM IF POSSIBLE -- SEE ALSO "REFERENCE MATERIALS" HIERARCHY FOR MORE PRECISE TERMINOLOGY)

(refers to Hierarchical Display)

```
TEACHERS

 SN     (NOTE: SEE "FACULTY" FOR OTHER
        SPECIFIC TERMINOLOGY RELATED TO
        "TEACHERS")
```

(refers to another term and all its cross-references in the Alphabetical Display)

```
UNIVERSITIES

 SN     DEGREE-GRANTING INSTITUTIONS OF
        HIGHER EDUCATION THAT TYPICALLY
        INCLUDE A LIBERAL ARTS
        UNDERGRADUATE COLLEGE, A
        GRADUATE SCHOOL, AND TWO OR MORE
        UNDERGRADUATE AND GRADUATE
        PROFESSIONAL SCHOOLS (NOTE: FOR
        SPECIFIC ASPECTS, USE A
        "COLLEGE" TERM WHERE A
        CORRESPONDING "UNIVERSITY" TERM
        IS NOT AVAILABLE)
```

(refers to the entire range of terms having the same word---thus, the Rotated Display)

d. Historical Notes

(1) Previous UF Established as Main Term

```
DAY CARE CENTERS

 SN     PROFESSIONALLY RUN FACILITIES
        THAT CARE FOR GROUPS OF CHILDREN
        ON A PARTIAL OR FULL DAY BASIS
        (NOTE: PRIOR TO MAR80, THE
        INSTRUCTION "DAY CARE CENTERS,
        USE DAY CARE SERVICES" WAS
        CARRIED IN THE THESAURUS)
```

```
REDUCTION IN FORCE

 SN     REDUCTION IN THE TOTAL NUMBER OF
        PEOPLE EMPLOYED BY AN
        ORGANIZATION -- INCLUDES SUCH
        METHODS AS LAYING OFF PERSONNEL,
        CREATING EARLY RETIREMENT
        OPTIONS, TRANSFERRING PERSONNEL,
        AND NOT FILLING OPENINGS CREATED
        THROUGH NORMAL STAFF ATTRITION
        (NOTE: PRIOR TO MAR77, THE
        INSTRUCTION "REDUCTION IN
        FORCE," USE "JOB LAYOFF" WAS
        CARRIED IN THE THESAURUS)
```

(2) Another Descriptor Used Previously for This Concept

COLLEGE SECOND LANGUAGE PROGRAMS

SN (NOTE: PRIOR TO MAR80, THIS CONCEPT WAS INDEXED UNDER "COLLEGE LANGUAGE PROGRAMS")

SCHOOL CATALOGS

SN PUBLICATIONS ISSUED BY SCHOOLS TO PROVIDE INFORMATION ON THEIR COURSES, FACULTY, FACILITIES, ETC. (NOTE: PRIOR TO MAR80, "CATALOGS" WAS USED TO INDEX THIS CONCEPT)

(3) Significant Change in Scope

POSTSECONDARY EDUCATION

SN ALL EDUCATION BEYOND THE SECONDARY LEVEL -- INCLUDES LEARNING ACTIVITIES AND EXPERIENCES BEYOND THE COMPULSORY SCHOOL ATTENDANCE AGE WITH THE EXCEPTION OF ADULT BASIC EDUCATION AND HIGH SCHOOL EQUIVALENCY PROGRAMS (NOTE: APPEARS IN THE LIST OF MANDATORY EDUCATIONAL LEVEL DESCRIPTORS -- BEFORE APR75, RESTRICTED TO EDUCATION BEYOND GRADE 12 AND LESS THAN THE BACCALAUREATE LEVEL)

(4) Previous Usage Has Varied (Useful for dealing with terms that have been used inconsistently)

FIELD EXPERIENCE PROGRAMS

SN PRACTICAL EXPERIENTIAL LEARNING ACTIVITIES UNDER INSTITUTIONAL OR ORGANIZATIONAL SPONSORSHIP, USUALLY AWAY FROM THE CLASSROOM OR CAMPUS -- ASSOCIATED MOST OFTEN WITH GRADES 10-16, AND CHARACTERIZED AS LESS FORMAL AND CONCENTRATED THAN PROFESSIONAL INTERNSHIP PROGRAMS (NOTE: BEFORE JUN78, THE USE OF THIS TERM WAS NOT RESTRICTED BY A SCOPE NOTE)

(restricts term to one meaning, gives date of restriction)

INEQUALITIES (1970 1980)

SN INVALID DESCRIPTOR -- USED INCONSISTENTLY IN INDEXING -- FOR MATHEMATICAL INEQUALITIES, USE "INEQUALITY (MATHEMATICS)" -- FOR EDUCATIONAL INEQUALITIES, USE "EQUAL EDUCATION" -- FOR SOCIAL OR ECONOMIC INEQUALITIES, SEE "DISADVANTAGED" OR DESCRIPTORS RELATING TO SOCIAL, RACE, SEX, OR ETHNIC BIAS OR DISCRIMINATION

(gives alternatives to an ambiguous term that has been made invalid)

PRODUCTIVE THINKING

SN CREATIVE THINKING THAT RESULTS IN SOMETHING NEW (NOTE: PRIOR TO MAR80, THE USE OF THIS TERM WAS NOT RESTRICTED BY A SCOPE NOTE)

SECURITY (PSYCHOLOGY)

SN BEING OR FEELING FREE FROM RISK OR UNCERTAINTY (NOTE: THE DESCRIPTOR "SECURITY," WITHOUT THE PARENTHETICAL QUALIFIER, WAS USED FROM 1967 TO MAR78)

(refers to an invalid "dead" term on which this improved term is based)

TELECOURSES

SN SEQUENCES OF LESSONS OFFERED OVER TELEVISION FOR CREDIT OR AUDITING PURPOSES (NOTE: FOR COURSES ON THE SUBJECT OF TELEVISION, USE "TELEVISION CURRICULUM" -- PRIOR TO MAR80, THIS TERM DID NOT CARRY A SCOPE NOTE)

(restricts term to one meaning and indicates appropriate term covering alternative meaning)

UNITED STATES HISTORY

SN (NOTE: PRIOR TO MAR80, "AMERICAN HISTORY" WAS OCCASIONALLY USED FOR THIS CONCEPT)

e. Notes Indicating a Range of Possible Applications or Subsumed Concepts

"Includes," "Example," and "Excludes" Scope Notes are useful devices for delineating the range of subject matter, characteristics, attributes, conditions, properties, or settings, found among the usages of a Descriptor.

(1) "INCLUDES..." Scope Notes

AMERICAN INDIANS

SN BOTH NORTH AND SOUTH AMERICAN INDIANS

ANNUAL REPORTS

SN INCLUDES DATA ON PROGRESS, FINANCE, MATERIAL, PERSONNEL, INSTRUCTION, ETC.

ITEM RESPONSE THEORY

SN THE STUDY OF TEST AND ITEM SCORES BASED ON ASSUMPTIONS CONCERNING THE MATHEMATICAL RELATIONSHIP BETWEEN ABILITIES (OR OTHER HYPOTHESIZED TRAITS) AND ITEM RESPONSES (NOTE: "ITEM RESPONSE THEORY" INCLUDES BOTH THE "RASCH MODEL" AND THE "BIRNBAUM MODELS" -- SEE THOSE IDENTIFIERS)

(refers to specific Identifiers that embody the concept)

LANGUAGE MAINTENANCE

SN THE MAINTENANCE OF A GIVEN LANGUAGE RATHER THAN ITS DISPLACEMENT BY ANOTHER LANGUAGE (INCLUDES MAINTAINING THE LANGUAGES OF CULTURAL MINORITY GROUPS THROUGH FAMILY PRACTICES, RITUALS, CONCERTED EDUCATIONAL ENDEAVORS WITH SOCIETY AT LARGE, ETC.)

MECHANICS (PHYSICS)

SN THE SCIENCE THAT DEALS WITH THE EFFECTS OF ENERGY AND FORCE ON THE EQUILIBRIUM, DEFORMATION, OR MOTION OF SOLID, LIQUID, AND GASEOUS BODIES -- INCLUDES BOTH CLASSICAL (NEWTONIAN) AND MODERN (ATOMIC-LEVEL) MECHANICS

NONINSTRUCTIONAL STUDENT COSTS

SN COSTS MET BY STUDENTS THAT ARE NOT INSTRUCTIONAL COSTS (TUITION, ETC.) BUT ARE NECESSARY IN THE PURSUIT OF AN EDUCATION -- INCLUDES ROOM AND BOARD, TRANSPORTATION EXPENSES, BOOK COSTS, PERSONAL EXPENSES, FOREGONE INCOME, ETC.

(distinguishes the term from its antonym)

PHYSICAL EXAMINATIONS

SN MEDICAL INSPECTIONS OF INDIVIDUALS TO DETERMINE THEIR PHYSICAL CONDITION, INCLUDING THE DETECTION OF PRESENT OR POTENTIAL DYSFUNCTION

(2) "Example" Scope Notes: "E.G.," "SUCH AS...," "AS IN..."

"Includes" and "Example" Scope Notes are similar in that they indicate scope by providing lists of subsumed concepts or by providing examples of possible applications.

ARTIFICIAL LANGUAGES

SN LANGUAGES CREATED FOR INTERNATIONAL COMMUNICATION, E.G., ESPERANTO, INTERLINGUA, NOVIAL, VOLAPUK

ASIAN STUDIES

SN STUDIES, USUALLY INTERDISCIPLINARY IN APPROACH, OF SUCH GEOGRAPHIC AREAS AS ASIATIC RUSSIA, ARMENIA, AZERBAIJAN, BANGLADESH, BHUTAN, CHINA, GEORGIA, KAZAKHSTAN, KIRGIZSTAN, INDIA, INDONESIA, JAPAN, KOREA, MALDIVES, MONGOLIA, NEPAL, PAKISTAN, THE PHILIPPINES, SRI LANKA, TAJIKISTAN, TURKMENISTAN, UZBEKISTAN, AND THE SOUTHEAST ASIAN SUBCONTINENT

DEVELOPMENTAL STAGES

SN NATURAL OR COMMON DIVISIONS OF THE HUMAN DEVELOPMENTAL PROCESS, CHARACTERIZED BY TYPES OF BEHAVIOR (AS IN THE ORAL STAGE), BY BIOLOGICAL PROPERTIES OR MANIFESTATIONS (AS IN THE EMBRYONIC STAGE), OR BY MENTAL PROCESSES (AS IN PIAGET'S "CONCRETE OPERATIONS" STAGE)

ELIGIBILITY

SN QUALIFYING FOR CERTAIN BENEFITS OR SERVICES (E.G., STUDENT ELIGIBILITY FOR FINANCIAL AID, INSTITUTIONAL ELIGIBILITY FOR ACCREDITATION, FAMILY ELIGIBILITY FOR WELFARE ASSISTANCE, EMPLOYEE ELIGIBILITY FOR RETIREMENT)

NEW JOURNALISM

SN REPORTING WHICH COMBINES TRADITIONAL JOURNALISM TECHNIQUES WITH SUCH DEVICES OF FICTION WRITING AS: SCENE BY SCENE RECONSTRUCTION OF SETTINGS, RECORDING OF DIALOGUE, USE OF THIRD PERSON POINT-OF-VIEW, AND EXTENSIVE RECORDING OF EXTERNAL CHARACTERISTICS OF INDIVIDUAL CHARACTERS -- EMPHASIS IS ON CAPTURING THE "CONCRETE REALITY" OR "IMMEDIACY" OF CULTURAL PHENOMENA

(3) "Excludes" Scope Notes: "OTHER THAN...," "RATHER THAN...," "UNLIKE...," and "NOT"

Sometimes it is easier to define a scope by stating what is excluded. This approach can both point to and distinguish from a Descriptor representing the excluded concept.

ABSTRACT REASONING

SN PROCESS OF REACHING CONCLUSIONS THROUGH THE USE OF SYMBOLS OR GENERALIZATIONS RATHER THAN ON CONCRETE FACTUAL INFORMATION

ANALOG COMPUTERS

SN COMPUTERS THAT TRANSLATE PHYSICAL CONDITIONS (FLOW, TEMPERATURE, PRESSURE, ETC.) INTO RELATED MECHANICAL OR ELECTRICAL QUANTITIES (LENGTH, VOLTAGE, CURRENT, ETC.) -- UNLIKE DIGITAL COMPUTERS, WHICH COUNT DISCRETE QUANTITIES, ANALOG COMPUTERS MEASURE CONTINUOUS VARIABLES

INFORMAL ASSESSMENT

SN APPRAISAL OF AN INDIVIDUAL'S OR GROUP'S STATUS OR GROWTH BY MEANS OTHER THAN STANDARDIZED INSTRUMENTS

LOW VISION AIDS

SN LENSES OR DEVICES OTHER THAN CONVENTIONAL EYEGLASSES USED TO IMPROVE VISUAL FUNCTIONING IN THE PARTIALLY SIGHTED

MIDDLE MANAGEMENT

SN THE INTERMEDIATE LEVEL OF MANAGEMENT, EXCLUDING TOP-LEVEL MANAGEMENT ON THE ONE HAND AND FIRST-LEVEL SUPERVISION ON THE OTHER

NONPROFIT ORGANIZATIONS

SN ORGANIZATIONS NOT DESIGNED PRIMARILY TO PAY DIVIDENDS ON INVESTED CAPITAL (NOTE: PRIOR TO DEC77, THE INSTRUCTION "NONPROFIT ORGANIZATIONS, USE VOLUNTARY AGENCIES" WAS CARRIED IN THE THESAURUS)

TORTS

SN PRIVATE OR CIVIL WRONGS, NOT INCLUDING BREACH OF CONTRACT, FOR WHICH PERPETRATORS MAY BE LEGALLY PROSECUTED AND INJURED PARTIES MAY BE COMPENSATED

f. Notes That Slant Meaning or Emphasis in Certain Directions (Without Precluding Other Possibilities)

Words such as "usually" can be important hedges in Scope Notes, avoiding excessively tight definitions. "Usually" and "generally" can also be helpful when definitions supplied by authorities differ or where shifts in meaning have occurred over time.

These qualifiers can be viewed as a continuum from "not-quite-absolute" to "maybe"---

(1) "ALMOST ALWAYS..."

IMMERSION PROGRAMS

SN EDUCATIONAL PROGRAMS IN WHICH ALL CURRICULUM MATERIALS ARE TAUGHT IN A SECOND LANGUAGE, GENERALLY AT THE ELEMENTARY LEVEL AND ALMOST ALWAYS WITHIN THE CONTEXT OF A FIRST LANGUAGE SCHOOL

(2) "ESPECIALLY...," "PARTICULARLY..."

EDUCATIONAL MALPRACTICE

SN WRONGFUL OR NEGLIGENT ACTS ON THE PART OF TEACHERS OR SCHOOLS THAT RESULT (OR MAY RESULT) IN STUDENT DETRIMENTS, ESPECIALLY INCLUDING THE FAILURE OF STUDENTS TO LEARN

PHARMACOLOGY

SN THE SCIENCE OF THE NATURE AND PROPERTIES OF DRUGS, PARTICULARLY THEIR ACTIONS OR EFFECTS (NOTE: SEE ALSO "PHARMACY")

BEST COPY AVAILABLE

(3) "USUALLY..."

ENDOWMENT FUNDS

SN CAPITAL SUMS SET ASIDE AS SOURCES OF INCOME -- THE PRINCIPAL OF EACH SUM IS USUALLY LEFT INTACT AND INVESTED, WHILE THE INCOME MAY BE EXPENDED

RETRENCHMENT

SN REDUCTION OF COSTS OR EFFORTS, USUALLY AS AN ECONOMIC NECESSITY

(4) "GENERALLY...," "NORMALLY..."

BUILDING SYSTEMS

SN ASSEMBLIES OF BUILDING SUBSYSTEMS AND COMPONENTS (STRUCTURAL AND MECHANICAL), WITH INSTRUCTIONS FOR PUTTING THEM TOGETHER -- NORMALLY THESE COMPONENTS ARE MASS-PRODUCED AND USED FOR SPECIFIC GENERIC PROJECTS IN BUILDING CONSTRUCTION

CURRICULUM

SN PLAN INCORPORATING A STRUCTURED SERIES OF INTENDED LEARNING OUTCOMES AND ASSOCIATED LEARNING EXPERIENCES -- GENERALLY ORGANIZED AS A RELATED COMBINATION OR SERIES OF COURSES (NOTE: USE A MORE SPECIFIC TERM IF POSSIBLE)

LIFETIME SPORTS

SN SPORTS WHERE PARTICIPATION CAN BE CARRIED ON THROUGHOUT ONE'S LIFETIME -- GENERALLY INCLUDES (BUT IS NOT NECESSARILY LIMITED TO) A VARIETY OF INDIVIDUAL AND DUAL SPORTS FOR WHICH FACILITIES ARE WIDELY AVAILABLE, AND BODY CONTACT IS LIMITED OR UNNECESSARY

(5) "FREQUENTLY..."

CAREER EXPLORATION

SN INVESTIGATING OCCUPATIONAL INTEREST AREAS OFTEN THROUGH REAL OR SIMULATED JOB EXPERIENCE -- FREQUENTLY FOUND IN CAREER EDUCATION PROGRAMS FOR GRADES 6 THROUGH 10

(6) "OFTEN..."

CAREER AWARENESS

SN APPRECIATION FOR AND UNDERSTANDING OF THE VARIETY OF TYPES OF CAREERS -- OFTEN REFERS TO THE INITIAL PHASE OF CAREER EDUCATION APPROPRIATE TO THE ELEMENTARY SCHOOL

HANDICRAFTS

SN CREATIVE ACTIVITIES OF MAKING ARTICLES BY HAND, OFTEN WITH THE AID OF SIMPLE TOOLS OR MACHINES -- ALSO, THE HANDIWORKS RESULTING FROM SUCH ACTIVITIES

(7) "SOMETIMES..."

ALTRUISM

SN CONSIDERATION FOR THE WELFARE OF OTHERS, SOMETIMES IN ACCORDANCE WITH AN ETHICAL SYSTEM

COLLEGE GOVERNING COUNCILS

SN ORGANIZATIONS OF FACULTY REPRESENTATIVES, SOMETIMES INCLUDING ADMINISTRATORS AND STUDENTS, THAT CONSIDER ADMINISTRATIVE, ACADEMIC, OR OPERATIONAL POLICIES OF THE INSTITUTION

LABOR EDUCATION

SN EDUCATION AND TRAINING OF WORKERS OFTEN SPONSORED BY LABOR UNIONS AND SOMETIMES IN COOPERATION WITH EDUCATIONAL INSTITUTIONS

(8) "PERHAPS..."

SELF SUPPORTING STUDENTS

SN STUDENTS WHO ARE LEGALLY (OR PERHAPS FINANCIALLY) INDEPENDENT OF THEIR PARENTS OR FORMER GUARDIANS

(9) "EMPHASES ON...," "ATTENTION ON..."

Special features or characteristics can be indicated in a number of ways---

- "WITH EMPHASIS...," "EMPHASIS IS ON..."

COMMUNICATIVE COMPETENCE (LANGUAGES)

SN THE ABILITY TO CONVERSE OR CORRESPOND WITH A NATIVE SPEAKER OF THE TARGET LANGUAGE IN A REAL-LIFE SITUATION, WITH EMPHASIS ON COMMUNICATION OF IDEAS RATHER THAN ON CORRECTNESS OF LANGUAGE FORM

ORIENTEERING

SN THE ACT OR SPORT OF CROSS-COUNTRY NAVIGATION USING A MAP AND COMPASS AS GUIDES -- EMPHASIS IS ON DETERMINING, THEN TAKING, THE SHORTEST AND QUICKEST WAY TO A SPECIFIED DESTINATION

- "WITH ATTENTION TO...," "ATTENTION IS GIVEN TO..."

ANTHROPOLOGICAL LINGUISTICS

SN APPLICATION OF ANTHROPOLOGICAL AND LINGUISTIC TECHNIQUES TO THE STUDY OF SPEECH COMMUNITIES, PARTICULARLY THOSE WITH NO WRITING SYSTEM -- ATTENTION IS GIVEN TO SPECIFIC INTERRELATIONSHIPS IN THE CONCURRENT AND SYSTEMATIC DEVELOPMENT OF CULTURE AND LANGUAGE

- "ASSOCIATED WITH..."

(See FIELD EXPERIENCE PROGRAMS, page VIII-1-56.)

g. Special Problems in Meaning and Usage Treated by Scope Notes

(1) Relational Homographs

"Relational homographs" are those terms whose meaning changes according to the direction of the relationship between the component concepts. Such terms should always be scoped. Whether they should be scoped to exclude one meaning or to include both will depend upon their usage.

Generally, if a relational homograph has been used primarily in only one sense, it should be scoped to exclude the other meaning. It should always be scoped to exclude the other meaning when other Descriptors exist to cover that other meaning. Examples:

COUNSELOR EVALUATION

SN PROCESS OF JUDGING COUNSELOR PERFORMANCE AS RELATED TO ESTABLISHED CRITERIA

EMPLOYEE ATTITUDES

SN ATTITUDES OF, NOT TOWARD, EMPLOYEES

PRIVATE FINANCIAL SUPPORT

SN FINANCIAL AID RECEIVED FROM PRIVATE SOURCES (NOTE: DO NOT CONFUSE WITH "PRIVATE SCHOOL AID")

TEACHER DISCIPLINE

SN DISCIPLINE OF, NOT BY, TEACHERS

TEACHER GUIDANCE

SN GUIDANCE PROVIDED BY TEACHERS (NOTE: PRIOR TO MAR80, THIS TERM WAS NOT SCOPED AND WAS SOMETIMES USED TO INDEX GUIDANCE GIVEN TO TEACHERS)

Only occasionally should a relational homograph be scoped to include both meanings, e.g.,

PUBLIC TELEVISION

SN NON-COMMERCIAL TELEVISION, PUBLICLY OWNED AND OPERATED, THAT IS DEDICATED TO EDUCATIONAL, CULTURAL, AND PUBLIC-SERVICE PROGRAMS

(both by and for the public)

(2) "Double" Scope Notes

Many concepts have two (or more) meanings or uses that are so closely related that they must be considered synonymous from the point of view of retrieval. ADJUSTMENT, for example, is both a condition and a process and is scoped as such. Most of the time such usage can be easily handled in the initial clause of a Scope Note; the *Thesaurus* provides many examples---

"BEING OR FEELING..."
"THE STATE OR QUALITY OF..."
"TRAITS OR QUALITIES..."
"THE ACT OR SPORT OF..."
"THE CONDITION AND PROCESS OF..."

In some cases, however, it is helpful to make the dual role of such concepts more obvious or explicit. This can be done through a "double" (or multiple) Scope Note. The Scope Note for DESIGN illustrates this by including the meaning of the term both as a noun and as a verb:

DESIGN

SN THE PROCESS OF CONCEIVING AND SELECTING THE STRUCTURE, ELEMENTS, ARRANGEMENT, MATERIALS, STEPS, OR PROCEDURES OF SOME ACTIVITY OR THING -- ALSO, THE PLAN, LAYOUT, OR MENTAL SCHEME THAT RESULTS (NOTE: USE A MORE SPECIFIC TERM IF POSSIBLE)

Other "double" Scope Notes show meanings that while separable are so conceptually intertwined that there would be little or no advantage to trying to tease them apart, e.g.,

FISCAL CAPACITY

SN WEALTH OF A GOVERNMENT, INSTITUTION, ORGANIZATION, OR INDIVIDUAL -- ALSO, THE RELATIVE ABILITY TO OBTAIN REVENUE

SOCIAL COGNITION

SN CONCEPTIONS ABOUT INTERPERSONAL AND SOCIAL PHENOMENA (E.G., PERSONS, THE SELF, MOTIVES, FEELINGS, RELATIONS, SOCIAL RULES, SOCIETAL INSTITUTIONS) -- ALSO, COGNITIVE PROCESSES AND SKILLS USED IN SOCIAL INTERACTION (E.G., COMMUNICATION SKILLS, PERSPECTIVE TAKING, EMPATHY)

A frequent need for double Scope Notes is found in the Descriptors representing the various intellectual disciplines, which in ERIC are also curriculum areas:

INTERNATIONAL RELATIONS

SN RELATIONS AMONG POLITICAL UNITS OF NATIONAL RANK -- ALSO, A FIELD OF STUDY (OFTEN CONSIDERED AS A BRANCH OF POLITICAL SCIENCE) DEALING PRIMARILY WITH FOREIGN POLICIES, THE ORGANIZATION AND FUNCTION OF GOVERNMENTAL AGENCIES CONCERNED WITH FOREIGN POLICY, AND THE FACTORS (AS GEOGRAPHY AND ECONOMICS) UNDERLYING FOREIGN POLICY

The meaning of terms may also vary between or among disciplines. These terms may be double-scoped when retrieval is not affected, e.g., when two contexts are so closely related that searchers would usually want them both and when other additional index terms would normally be used to distinguish the contexts. Example:

ERROR ANALYSIS (LANGUAGE)

SN IN LANGUAGE TEACHING AND TESTING, A TECHNIQUE OF MEASURING PROGRESS AND OF DEVISING TEACHING METHODS BY RECORDING AND CLASSIFYING THE MISTAKES MADE BY STUDENTS -- IN LINGUISTICS, THE OBSERVATION OF ERRORS IN THE SPEECH PROCESS AS A MEANS OF UNDERSTANDING THE PHONOLOGICAL AND SEMANTIC COMPONENTS OF LANGUAGE, INTERACTIONAL PROCESSES, AND SPEAKERS' DISCOURSE STRATEGIES

Also, some terms are used interchangeably in both broad and narrow senses, e.g.,

EDUCATIONAL TECHNOLOGY

SN SYSTEMATIC IDENTIFICATION, DEVELOPMENT, ORGANIZATION, OR UTILIZATION OF EDUCATIONAL RESOURCES AND/OR THE MANAGEMENT OF THESE PROCESSES -- OCCASIONALLY USED IN A MORE LIMITED SENSE TO DESCRIBE THE USE OF EQUIPMENT-ORIENTED TECHNIQUES OR AUDIOVISUAL AIDS IN EDUCATIONAL SETTINGS

(3) "Forced" Concepts

Concepts that, in indexing, have been "forced" into being represented by a closely related Descriptor should be established as new Descriptors if the initial Descriptor becomes moderately to well posted or high to moderate search interest develops.

Where the "forced" concept has in the past been represented in the *Thesaurus* by a USE reference, creation of a note linking past with present is appropriate, e.g.,

BEHAVIOR MODIFICATION

SN ALTERATION OF BEHAVIOR BY THE USE OF CONDITIONING TECHNIQUES (NOTE: PRIOR TO MAR80, THE INSTRUCTION "BEHAVIOR MODIFICATION, USE BEHAVIOR CHANGE" WAS CARRIED IN THE THESAURUS)

When no USE reference is present (or where the word form of the USE reference varies from that selected as the preferred form of the new Descriptor), the historical note linking the term with its prior indexing requires other forms, e.g.,

MULTICULTURAL EDUCATION

SN EDUCATION INVOLVING TWO OR MORE ETHNIC GROUPS AND DESIGNED TO HELP PARTICIPANTS CLARIFY THEIR OWN ETHNIC IDENTITY AND APPRECIATE THAT OF OTHERS, REDUCE PREJUDICE AND STEREOTYPING, AND PROMOTE CULTURAL PLURALISM AND EQUAL PARTICIPATION (NOTE: DO NOT CONFUSE WITH "CROSS CULTURAL TRAINING," WHICH, PRIOR TO JAN79, WAS FREQUENTLY USED FOR "MULTICULTURAL EDUCATION")

Where two concepts have previously been "forced" under one Descriptor as a result of "word indexing" (i.e., indexing strictly by words rather than by the meanings behind them), a reciprocal historical note should be made, e.g.,

FOUNDATION PROGRAMS

SN SYSTEMS WHEREBY STATE FUNDS ARE USED TO SUPPLEMENT LOCAL OR INTERMEDIATE SCHOOL DISTRICT FUNDS FOR ELEMENTARY AND SECONDARY EDUCATION -- A "MINIMUM FOUNDATION" OF FINANCIAL SUPPORT IS USUALLY GUARANTEED REGARDLESS OF THE LOCAL DISTRICT'S ABILITY TO SUPPORT EDUCATION (NOTE: PRIOR TO MAR80, THIS TERM WAS NOT SCOPED AND WAS SOMETIMES USED TO INDEX "PHILANTHROPIC FOUNDATIONS")

PHILANTHROPIC FOUNDATIONS

SN TRUSTS OR CORPORATIONS CREATED FOR CHARITABLE PURPOSES THAT PROVIDE GRANTS OF FUNDS TO FINANCE RESEARCH, SERVICES, FACILITIES, EQUIPMENT, OR LIBRARY RESOURCES (NOTE: PRIOR TO MAR80, THIS CONCEPT WAS OFTEN INDEXED UNDER "FOUNDATION PROGRAMS," WHICH WAS NOT SCOPED)

(4) Mandatory Leveling Terms

Scope Notes must account for Descriptors having any special roles or functions in ERIC indexing. The mandatory educational level Descriptors are intended to serve a "classing" function---to bring together all materials falling within a certain educational range. (See Section VII, item I.3.a.(1) of this manual.)

The use of a limited authority list of educational level terms for this special function is somewhat at variance with the principle of indexing to the level of specificity of the document/article. One effect is their preponderant assignment as minor index terms. They are major index terms only when representing the subject of a document.

Because of their unique status, the mandatory educational level Descriptors are flagged within the body of the *Thesaurus* with a special instruction in the Scope Note, e.g.,

HIGHER EDUCATION

SN ALL EDUCATION BEYOND THE SECONDARY LEVEL LEADING TO A FORMAL DEGREE (NOTE: ALSO APPEARS IN THE LIST OF MANDATORY EDUCATIONAL LEVEL DESCRIPTORS)

(5) Descriptors Corresponding to Publication Type Categories

Certain Descriptors are sometimes used to index document characteristics other than subject content. Among these are the so-called "Publication Type" Descriptors that are frequently used to index document form, e.g., ABSTRACTS, CURRICULUM GUIDES, QUESTIONNAIRES.

Since mid-1974, however, ERIC has provided a special field for Publication Type tags. Wherever there is an exact match between one of the authorized Publication Type categories and a Descriptor, the Descriptor (as of March 1980) has been reserved for use only when indexing document subject, e.g.,

BIBLIOGRAPHIES

SN DESCRIPTIVE LISTS OF BOOKS OR OTHER PRINTED MATERIALS, WHICH ARE WRITTEN BY ONE AUTHOR, DURING ONE PERIOD, ON ONE SUBJECT, PRODUCED BY ONE PRINTER AND/OR PUBLISHER, OR LOCATED IN ONE PLACE (NOTE: CORRESPONDS TO PUBTYPE CODE 131 -- DO NOT USE EXCEPT AS THE SUBJECT OF A DOCUMENT)

TESTS

SN DEVICES, PROCEDURES, OR SETS OF ITEMS THAT ARE USED TO MEASURE ABILITY, SKILL, UNDERSTANDING, KNOWLEDGE, OR ACHIEVEMENT (NOTE: USE A MORE SPECIFIC TERM IF POSSIBLE -- THIS BROAD TERM CORRESPONDS TO PUBTYPE CODE 160 AND SHOULD NOT BE USED EXCEPT AS THE SUBJECT OF A DOCUMENT)

DOCTORAL DISSERTATIONS

SN THESES SUBMITTED IN PARTIAL FULFILLMENT OF DOCTORAL DEGREE REQUIREMENTS (NOTE: CORRESPONDS TO PUBTYPE CODE 041 -- DO NOT USE EXCEPT AS THE SUBJECT OF A DOCUMENT)

The 22 Descriptors so limited are listed in the Introduction to the *Thesaurus* and are discussed in greater detail in Section VII, item I.3.d of this manual.

(6) Ambiguous Usage

Certain ERIC Descriptors have had such inconsistent usage over time as to have little value in retrieval. The postings level of some of these terms may be so large as to make reposting to other, more precise terms impractical.

As such terms are discovered and if it is determined that postings cannot be readily transferred, they are relegated to "dead" term status. In other words, they are qualified in the *Thesaurus* with birth/death dates, along with relatively standardized Scope Notes that lead users to other terminology.

EDUCATIONAL PROGRAMS (1966 1980)

SN INVALID DESCRIPTOR -- USED INCONSISTENTLY IN INDEXING -- COORDINATE MORE SPECIFIC DESCRIPTORS

(very broad term used inconsistently in prior years and therefore with little apparent retrieval value---further study may show that most postings may be purged without loss)

HISTORICAL CRITICISM (1969 1980)

SN INVALID DESCRIPTOR -- ORIGINALLY INTENDED AS A LITERARY TERM, BUT USED INDISCRIMINATELY IN INDEXING -- SEE "LITERARY CRITICISM" AND APPROPRIATE "HISTORY" TERM(S) FOR THIS CONCEPT -- SEE ALSO "LITERARY HISTORY" OR "HISTORIOGRAPHY"

(indiscriminate usage of this term was caused by "word indexing"---postings need to be examined individually to determine potential value)

SELF EVALUATION (1966 1980)

SN INVALID DESCRIPTOR -- USED FOR PERSONAL, ORGANIZATIONAL, OR PROGRAM SELF EVALUATION -- SEE "SELF EVALUATION (INDIVIDUALS)" AND "SELF EVALUATION (GROUPS)" RESPECTIVELY FOR THESE CONCEPTS

(heavily posted term with two meanings, which need to be distinguished---every usage will most likely need to be reposted to one of two preferred Descriptors)

Retrieval considerations occasionally necessitate a cross-reference in the Scope Notes of preferred terms back to "dead" terms. ("Dead" terms carry no standard *Thesaurus* cross-references, i.e., NTs, BTs, and RTs.)

AMERICAN HISTORY (1966 1980)

SN INVALID DESCRIPTOR -- ALTHOUGH SCOPE NOTE REFERRED TO NORTH, SOUTH, AND CENTRAL AMERICA, TERM USED FREQUENTLY FOR U.S. HISTORY -- SEE "NORTH AMERICAN HISTORY," "LATIN AMERICAN HISTORY," OR "UNITED STATES HISTORY"

UNITED STATES HISTORY

SN (NOTE: PRIOR TO MAR80, "AMERICAN HISTORY" WAS OCCASIONALLY USED FOR THIS CONCEPT)

(7) Dates Appearing in Instructional Scope Notes

Dates in instructional Scope Notes reflect the calendar month/year of particular *Thesaurus* updates or changes and do not refer to RIE and CIJE issues. *Thesaurus* updates usually occur from 1 to 2 months in advance of RIE/CIJE issues; however, on occasion, they may occur up to 6 months ahead of these publications. Therefore, searchers must assume that a given change may not have been effective in RIE or CIJE for up to 6 months after a Scope Note's calendar date. For that 6-month period, searchers should consider and employ both the old (pre-change) way of indexing and the new way of indexing.

5. UF (Used For)/USE References

a. General

The UF and USE references are generally employed to solve problems of synonymy occurring in natural language. Terms following the UF notation are synonyms or variant forms of so-called main terms or postable Descriptors. These synonyms or quasi-synonyms, also known as "non-preferred" terms, are not used in indexing or searching; their listing merely provides a pathway to the preferred terms in the *Thesaurus*. They thus serve as the access vocabulary, i.e., they represent various points of entry that users (both indexers and searchers) are likely to try. Ideally, there should be as many entry points for a given concept as there are ways to describe that concept.

The importance of the UF notation extends beyond the clear-cut case of synonymy. The notation can represent the relationship to a Descriptor of a near synonym that has a general conceptual similarity, but that is not a true synonym, and it may also be used to indicate highly specific terms that, for the purposes of storage and retrieval, are indexed under a more general term.

UFs are entered in the *Thesaurus* as cross-references to main terms, e.g.,

LABOR
  UF MANPOWER

GRADES (SCHOLASTIC)
  UF MARKS (SCHOLASTIC)

For each UF entered in this manner, the ERIC *Thesaurus* software automatically generates a reciprocal USE reference. (USE references cannot be added directly to the *Thesaurus*; they appear only as a reciprocal result of the generation of UFs.) The reciprocals of the above UFs are:

MANPOWER
  USE LABOR

MARKS (SCHOLASTIC)
USE GRADES (SCHOLASTIC)

These reciprocals are mandatory. They refer the *Thesaurus* user from a non-postable or non-indexable term to the preferred, indexable term or terms.

b. **Summary of Approved Functions for USE References**

(1) To refer from synonyms and variant word forms to the preferred form established as the main term. "Synonym" must be understood to mean synonymous for the purposes of retrieval in ERIC. Distinctions made in the literature and in authorities are not important if they do not hold up from the point of view of retrieval.

SIGHT
USE VISION

HOKKU
USE HAIKU

SUBJECT ACCESS
USE INDEXING

ABUSED CHILDREN
USE CHILD ABUSE

DEATH EDUCATION
USE DEATH

(2) To refer from a highly specific term to a more general term (posting up), including bringing together the points in a conceptual continuum.

LEGAL SECRETARIES
USE SECRETARIES

GAS WELDING
USE WELDING

EARLY DETECTION
USE IDENTIFICATION

(3) To refer from a commonly accepted acronym or abbreviation to its full form.

ITA
USE INITIAL TEACHING ALPHABET

LRC
USE LEARNING RESOURCES CENTERS

(4) To refer from a colloquial term to its scientific or technical equivalent, or from a scientific or technical term to its commonly used equivalent.

CROSS EYES
USE STRABISMUS

CYESIS
USE PREGNANCY

(5) To refer from older to current terminology.

NEGROES (1966 1977)
USE BLACKS

(6) To refer from an antonym when distinctions between opposites are determined to be unimportant for ERIC retrieval.

DEHUMANIZATION
USE HUMANIZATION

MALNUTRITION
USE NUTRITION

(7) To prescribe simultaneous use of more than one term to express a concept.

```
FATHER ROLE
 USE    FATHERS
 and    PARENT ROLE
```

(8) To refer from a deleted main term to the main term(s) to which the older postings have been transferred.

```
COLLECTIVE NEGOTIATION (1967
1977)
 USE    COLLECTIVE BARGAINING
```

c. Rules for USE References

The phrase "USE reference" and the abbreviation "UF" represent reciprocal references to and from the same entity, a non-postable *Thesaurus* term, and the two are often used interchangeably in the following discussion, depending on the point being made.

UF construction follows the rules for the construction of main terms (see item D.2.c of this section), including:

- UFs are limited to 50 characters, including blanks.
- Only noun and noun phrases should be used for UFs.
- Parentheses ( ) are the only punctuation allowed in UFs.

The following additional rules also apply:

(1) UFs may refer laterally or upward, but never downward, i.e., never from a broader concept to a narrower, more specific concept.

(2) UFs must bear the same relationship to the hierarchy (BTs/NTs) of a main term as does the main term itself---except where a UF, conceptually bearing an RT relationship to the main term, is being treated as synonymous for the purposes of retrieval.

(3) UFs must bear the same relationship to the RTs of the main term as does the main term itself.

(4) UFs are restricted to useful entry points---those for which there is good probability of use.

(5) *All* entry points likely as user approaches to a concept should be included as UFs in the *Thesaurus*.

d. Evaluation and Decision Criteria for USE References

(1) Relationship Between UF and Main Term

The relationship between a UF and its main term should normally be either synonymous or hierarchical.

- Testing for Synonymity

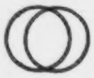
  Synonyms can be tested by inserting the words "is always" or "are always" between the two terms. The relationship should be true in both directions. Examples:

  [UF] is always [main term]
  [main term] is always [UF]

`SELF DISCIPLINE` `USE SELF CONTROL`	**SELF DISCIPLINE is always SELF CONTROL** **SELF CONTROL is always SELF DISCIPLINE**
`MINORITY CULTURE` `USE MINORITY GROUPS`	**MINORITY CULTURE is always MINORITY GROUPS** **MINORITY GROUPS are always MINORITY CULTURE**
`VILLAGE WORKERS` `USE CHANGE AGENTS`	**VILLAGE WORKERS are always CHANGE AGENTS** **CHANGE AGENTS are always VILLAGE WORKERS**

---- If the test holds true in both directions, the terms are synonymous.

---- If the terms do not meet the test of "always" in both directions, but do meet the test of "usually" or "frequently," they are near-synonyms. Then the criterion is whether they are synonymous for the purposes of retrieval from the ERIC database. For example, SELF DISCIPLINE and SELF CONTROL are not identical, but are very nearly so:



--- If the UF term were also established as a main term, would the postings on the two terms be distinguishable?

--- Would searchers frequently want one concept but not the other?

If the answers to these questions are negative, then the terms are essentially synonymous and the UF term is appropriate.

---- If the two terms meet the test of "always" only in the direction "UF is always main term," then the relationship is hierarchical and legitimate.

---- If the two terms meet the test of "sometimes" in one or both directions, e.g., CHANGE AGENTS are sometimes VILLAGE WORKERS, then there may be a hidden hierarchical relationship that could be expressed in a new pre-coordination: VILLAGE [or rural] CHANGE AGENTS Use CHANGE AGENTS.

- Testing for Hierarchy

Hierarchically related UFs can be similarly tested by inserting the words "kind(s) of" or "specific application of" between the two terms. The relationship will hold true in one direction. Examples:

[UF] are kinds of [main term]
[main term] are kinds of [UF]

`GRANDFATHERS` `USE GRANDPARENTS`	**GRANDFATHERS are kinds of GRANDPARENTS (true)** **GRANDPARENTS are kinds of GRANDFATHERS (false)**
`FAILURE` `USE ACADEMIC FAILURE`	**FAILURE is a kind of ACADEMIC FAILURE (false)** **ACADEMIC FAILURE is a kind of FAILURE (true)**
`GRAIN MARKETING` `USE GRAINS (FOOD)`	**GRAIN MARKETING is a specific application of GRAINS (FOOD) (true)** **GRAINS (FOOD) is a specific application of GRAIN MARKETING (false)**

---- If the test holds true from UF to main term, the relationship is upward and legitimate.

---- If the test holds true from main term to UF, the relationship is downward and violates the rules for UFs. Such errors can be remedied by qualifying the UF, e.g., FAILURE (SCHOLASTIC).

---- If the test does not hold true in either direction, the relationship is an RT relationship and violates the rules. However, it should be remembered that such relationships may exist whenever the concepts are judged to be sufficiently synonymous for searching purposes. (For a brief discussion of these RT relationships, see "Special Problems in Meaning and Usage" below, item "D.5.e.(5).")

(2) Relationship Between UF and Rest of Cross-Reference Structure

The BTs, NTs, and RTs of a main term should normally have the same relationship to a UF of the main term as they do to the main term itself.

Examples:

FILMS
UF BLACK AND WHITE FILMS
CINEMA
COLOR FILMS
MOTION PICTURES
SILENT FILMS
SOUND FILMS (1966 1980)
NT FOREIGN LANGUAGE FILMS
INSTRUCTIONAL FILMS
KINESCOPE RECORDINGS
SINGLE CONCEPT FILMS
BT MASS MEDIA
NONPRINT MEDIA
VISUAL AIDS
RT AUTEURISM
CAPTIONS
CARTOONS
COPYRIGHTS
DOCUMENTARIES
FILM CRITICISM
FILM INDUSTRY
FILM LIBRARIES
FILM PRODUCTION
FILM STUDY
FILMOGRAPHIES
FILMSTRIPS
LITERARY STYLES
PHOTOGRAPHS
POPULAR CULTURE
REPETITIVE FILM SHOWINGS
THEATER ARTS
TRANSPARENCIES
VIDEOTAPE RECORDINGS

(UFs are appropriate to NTs and BTs)

DISARMAMENT
UF ARMS CONTROL
MULTILATERAL DISARMAMENT
NUCLEAR CONTROL
UNILATERAL DISARMAMENT
RT ARMED FORCES
CONFLICT
INTERNATIONAL RELATIONS
MILITARY SCIENCE
NATIONAL DEFENSE
NUCLEAR WARFARE
PEACE
WAR
WORLD PROBLEMS

(UFs are appropriate to the RTs)

(3) Usefulness of UF as an Access Point

The access point provided by the UF should be genuinely useful, i.e.,

- there should be a good possibility that users of the *Thesaurus* might actually approach the concept via the UF's terminology; and
- the UF's terminology should be found in the literature and in relatively common discourse.

Example:

```
FASHION INDUSTRY
  SN  CONCERNED WITH THE DESIGN,
      PRODUCTION, AND MARKETING OF
      CLOTHING
  UF  APPAREL INDUSTRY
      CLOTHING INDUSTRY
      GARMENT INDUSTRY
  BT  INDUSTRY
  RT  CLOTHING
      CLOTHING DESIGN
      CLOTHING INSTRUCTION
      NEEDLE TRADES
      OCCUPATIONAL HOME ECONOMICS
      SERVICE OCCUPATIONS
      SEWING INSTRUCTION
      SEWING MACHINE OPERATORS
      TEXTILES INSTRUCTION
```

(4) Need for UF as an Access Point

The need for additional UFs or access points can be tested as follows:

- Check the *Rotated Display* under the key component words of the main term to see the surrounding "terminology terrain." Determine whether UFs from and to those words point to other words that meet the test for synonymity or near-synonymity. Any identifiable patterns of references not already provided for in the Descriptor's UFs should be added.

  In the example below, the adjective "occupational" of the 2-word Descriptor OCCUPATIONAL TESTS is viewed in the context of the *Rotated Display*. Alternative words (such as "JOB," "VOCATIONAL," "CAREER," "EMPLOYMENT") that should be considered as additional access points are easily seen.

<u>ALPHABETICAL DISPLAY</u>

```
OCCUPATIONAL TESTS
  SN TESTS DESIGNED TO PREDICT JOB
     PERFORMANCE BY RECORDING SPECIFIC
     ABILITIES AND INTERESTS THAT
     CORRESPOND WITH THOSE OF PERSONS
     SUCCESSFULLY ENGAGING IN THE
     PARTICULAR FIELD OF WORK (NOTE:
     FOR OCCUPATIONAL INTEREST
     INVENTORIES, USE "INTEREST
```

INVENTORIES")
UF ADMISSION TESTS (OCCUPATIONAL)
EMPLOYMENT TESTS
PERSONNEL TESTS
VOCATIONAL TESTS
NT WORK SAMPLE TESTS
BT TESTS
RT APTITUDE TESTS
ASSESSMENT CENTERS (PERSONNEL)
CAREER COUNSELING
EMPLOYMENT QUALIFICATIONS
INTEREST INVENTORIES
JOB PERFORMANCE
JOB SKILLS
LICENSING EXAMINATIONS (PROFESSIONS)
MATURITY TESTS
PERFORMANCE TESTS
PERSONNEL EVALUATION
PREDICTIVE MEASUREMENT
VOCATIONAL APTITUDE
VOCATIONAL EVALUATION
VOCATIONAL INTERESTS

ROTATED DISPLAY

OCCUPATIONAL ADJUSTMENT Use VOCATIONAL ADJUSTMENT
ADMISSION TESTS (OCCUPATIONAL) Use OCCUPATIONAL TESTS
OCCUPATIONAL ANALYSIS Use JOB ANALYSIS
OCCUPATIONAL ASPIRATION
OCCUPATIONAL ASPIRATION LEVEL Use OCCUPATIONAL ASPIRATION
OCCUPATIONAL AWARENESS Use CAREER AWARENESS
OCCUPATIONAL CHOICE (1966 1980) Use CAREER CHOICE
OCCUPATIONAL CLUSTERS
OCCUPATIONAL COUNSELING Use CAREER COUNSELING
OCCUPATIONAL DISEASES
SUPERVISED OCCUPATIONAL EXPERIENCE (AGRICULTURE)
OCCUPATIONAL EXPLORATION Use CAREER EXPLORATION
OCCUPATIONAL FAMILIES Use OCCUPATIONAL CLUSTERS
OCCUPATIONAL FOLLOWUP Use VOCATIONAL FOLLOWUP
OCCUPATIONAL GUIDANCE (1966 1980) Use CAREER GUIDANCE
OCCUPATIONAL HEALTH Use OCCUPATIONAL SAFETY AND HEALTH
OCCUPATIONAL HOME ECONOMICS
OCCUPATIONAL INFORMATION
OCCUPATIONAL INFORMATION SYSTEMS Use CAREER INFORMATION SYSTEMS
OCCUPATIONAL LEVEL Use EMPLOYMENT LEVEL
OCCUPATIONAL MOBILITY
PROMOTION (OCCUPATIONAL)
OCCUPATIONAL PSYCHOLOGY Use INDUSTRIAL PSYCHOLOGY
OCCUPATIONAL SAFETY AND HEALTH
OCCUPATIONAL SAFETY AND HEALTH STANDARDS Use LABOR STANDARDS and
OCCUPATIONAL SAFETY
AND HEALTH
OCCUPATIONAL SATISFACTION Use JOB SATISFACTION
OCCUPATIONAL SUCCESSION Use OCCUPATIONAL MOBILITY
OCCUPATIONAL SURVEYS
OCCUPATIONAL TESTS
OCCUPATIONAL THERAPISTS
OCCUPATIONAL THERAPY
OCCUPATIONAL THERAPY ASSISTANTS
OCCUPATIONAL TRAINING Use JOB TRAINING

- Make sure that access is provided from important key words in the main term (or perhaps in the Scope Note), e.g.,

```
FEAR OF SUCCESS
  SN NEED TO REFRAIN FROM MAXIMALLY
     UTILIZING ONE'S ABILITIES IN
     ACHIEVEMENT SITUATIONS BECAUSE OF
     EXPECTED NEGATIVE CONSEQUENCES
  UF SUCCESS AVOIDANCE
  BT FEAR
  RT ACHIEVEMENT
     FAILURE
     GOAL ORIENTATION
     INHIBITION
     LOW ACHIEVEMENT
     MOTIVATION
     SELF MOTIVATION
     SEX ROLE
     SUCCESS
     UNDERACHIEVEMENT
```

```
PRETEND PLAY
  SN PLAY INVOLVING FANTASY OR MAKE
     BELIEVE
  UF FANTASY PLAY
     MAKE BELIEVE PLAY
     SYMBOLIC PLAY
  BT PLAY
  RT BEHAVIOR DEVELOPMENT
     BEHAVIOR PATTERNS
     DRAMATIC PLAY
     FANTASY
     IMAGINATION
     IMITATION
     ROLE PLAYING
```

- Check titles of documents and articles posted to the main term for clues about alternate word forms and terminology.

```
FUTURES (OF SOCIETY)
  UF  ALTERNATIVE FUTURES
      FUTURE STUDIES
      FUTURISM
      FUTURISTICS
      FUTUROLOGY
  RT  APPROPRIATE TECHNOLOGY
      CULTURE LAG
      DECISION MAKING
      DELPHI TECHNIQUE
      EMERGING OCCUPATIONS
      LONG RANGE PLANNING
      PLANNING
      PREDICTION
      PUBLIC POLICY
      RELEVANCE (EDUCATION)
      REVOLUTION
      SCIENCE AND SOCIETY
      SOCIAL CHANGE
      SOCIAL INDICATORS
      TECHNOLOGICAL ADVANCEMENT
      TREND ANALYSIS
      VALUES
      WORLD AFFAIRS
```

Futures (of Society)

Alternative Images of the Future: Scenarios for Education and the Preparation of Teachers. Conference Proceedings.
ED 181 015

Alternative Scenarios of the American Future: 1980-2000.
ED 176 037

America o Aztlan? Los Chicanos En El Ano 2001 (America or Aztalan? Chicanos in the Year 2001).
ED 178 247

Article Booklet for the Eleventh Course by Newspaper Connections: Technology and Change.
ED 18

A Futures Curriculum for Symmetry.
ED 180 906

Future Studies in the K-12 Curriculum.
ED 180 859

Future Tense: A Workbook for Planning the Use of Land.
ED 176 943

Future Trends in Education Policy.
ED 177 665//

Futurism: Framework for Composition.
ED 179 980

Futuristic Forecasting: Calculated Curriculum Relevance (Using the Methods of the Futurist as a Forecasting Technique).
ED 175 804

Futuristic Images of Guidance and Student Services.
ED 181 400

Futuristics and Education: An ASCD Task Force Report. Professional Paper, 1979-1.
ED 178 384

Futuristics and Education. Fastback 131.
ED 178 398

General Ed[illegible] for the Too Late Generation.
ED

- Make sure that access is provided for embedded concepts in any compound words in the main term, e.g., COLLEGE COOPERATION, in the case below:

```
INTERCOLLEGIATE COOPERATION
  SN  COOPERATION BETWEEN OR AMONG
      COLLEGES, UNIVERSITIES, OR
      PROFESSIONAL SCHOOLS
  UF  COLLEGE COOPERATION (1966 1980)
      INTERCOLLEGIATE ATHLETICS #
      INTERCOLLEGIATE PROGRAMS (1967 1980)
  BT  EDUCATIONAL COOPERATION
      INSTITUTIONAL COOPERATION
  RT  ARTICULATION (EDUCATION)
      COLLEGE PLANNING
      COLLEGE SCHOOL COOPERATION
      COLLEGES
      CONSORTIA
```

e. Special Problems in Meaning and Usage

(1) Filing Order/Filing Distance

The requirements for effective access to the vocabulary vary in different alphabetical sections of the *Thesaurus*. Provision of UFs that have the same first word as the main term is unnecessary if they will file in close proximity to the main term, and if the possibility of additional intervening references and displays appears small. Similarly, several UFs referring to the same Descriptor are redundant if they will file together, whether or not they will appear adjacent to the main term. However, in core areas of the *Thesaurus*, such as the "school" terms, the "student" terms, etc., UFs beginning with the same word, or beginning with the same word as the main term, may nevertheless file at a substantial distance from each other. These references may be vital, e.g.,

SCHOOL PERSONNEL
  UF SCHOOL EMPLOYEES
    SCHOOL OFFICIALS

A further consideration in determining the usefulness of additional references of this type is the effect of word-by-word filing of the *Thesaurus* Alphabetical Display. In letter-by-letter filing used in ERIC *Thesaurus* editions before 1980, certain USE references would file immediately before or after their respective main terms, and the chances were remote that new entries would fall between them. The following two sets illustrate this situation:

```
AUTO MECHANICS                       SOCIALIZATION
  UF    AUTOMOBILE MECHANICS           UF    SOCIAL LEARNING


AUTOMOBILE MECHANICS                 SOCIAL LEARNING
  USE   AUTO MECHANICS                 USE   SOCIALIZATION
```

With word-by-word filing, however, many entries now intervene between these sets of terms and the importance of having the USE references is more pronounced.

(2) Error of "Mixed Signals"

Confusion can occur when UFs are considered only from the point of view of the main term. In evaluating UFs and in judging their correctness, it is imperative to consider them not only in the Main Term display but also—

- at the place where they file reciprocally

GUIDANCE SPECIALISTS
USE GUIDANCE PERSONNEL

GUIDANCE WORKERS
USE COUNSELORS

- under each word in the rotated display

TEACHER COMPETENCY
USE TEACHER QUALIFICATIONS

TEACHER QUALITY
USE TEACHING QUALITY

TEACHER EFFECTIVENESS
USE EFFECTIVE TEACHING

The above examples of "mixed signals" existed in the pre-1980 *Thesaurus*.

The situation illustrated by the first example was particularly confusing because COUNSELORS was (and is) a Narrower Term of GUIDANCE PERSONNEL. This error was corrected in three steps:

---Deleting GUIDANCE WORKERS as a UF.

---Clarifying GUIDANCE SPECIALISTS with a double USE reference.

GUIDANCE SPECIALISTS
USE GUIDANCE PERSONNEL
and SPECIALISTS

---Adding a historical note to the Scope Note of GUIDANCE PERSONNEL.

GUIDANCE PERSONNEL
SN PROFESSIONALS ENGAGED IN ASSISTING INDIVIDUALS AND GROUPS TO DEVELOP REALISTIC AND SATISFYING PLANS, GOALS, AND ACTIVITIES (NOTE: PRIOR TO MAR80, THE INSTRUCTION "GUIDANCE WORKERS, USE COUNSELORS" WAS CARRIED IN THE THESAURUS)

The mixed signals among the above "teacher" term examples were repaired with the following two displays:

TEACHER EFFECTIVENESS
SN DEGREE TO WHICH TEACHERS ARE SUCCESSFUL IN SATISFYING THEIR OBJECTIVES, OBLIGATIONS, OR FUNCTIONS
UF EFFECTIVE TEACHING (1966 1980)
TEACHER QUALITY
TEACHING QUALITY (1966 1980)
BT TEACHER BEHAVIOR
RT ACADEMIC ACHIEVEMENT
CLINICAL SUPERVISION (OF TEACHERS)
EDUCATIONAL QUALITY
EXCELLENCE IN EDUCATION
INSTRUCTIONAL EFFECTIVENESS

```
        INSTRUCTIONAL IMPROVEMENT
        INSTRUCTIONAL INNOVATION
        SCHOOL EFFECTIVENESS
        STUDENT EVALUATION OF TEACHER
          PERFORMANCE
        TEACHER EVALUATION
        TEACHER INFLUENCE
        TEACHER ROLE
        TEACHERS
        TEACHING (OCCUPATION)
        TEACHING MODELS
        TEACHING SKILLS
        TEACHING STYLES


TEACHER QUALIFICATIONS
  SN    ONE'S EDUCATION, EXPERIENCE, AND
        PHYSICAL, SOCIAL, AND MENTAL
        CHARACTERISTICS THAT DETERMINE
        FITNESS FOR A TEACHING POSITION
  BT    QUALIFICATIONS
  RT    ALTERNATIVE TEACHER CERTIFICATION
        EMPLOYMENT QUALIFICATIONS
        MISASSIGNMENT OF TEACHERS
        TEACHER BACKGROUND
        TEACHER CERTIFICATION
        TEACHER CHARACTERISTICS
        TEACHER EDUCATION
        TEACHER EDUCATION CURRICULUM
        TEACHER EVALUATION
        TEACHER SELECTION
        TEACHERS
        TEACHING (OCCUPATION)
        TEACHING EXPERIENCE
```

(Note: No reference was found to be necessary to the old UF TEACHER COMPETENCY since a postings check showed it to have no impact on the earlier use of TEACHER QUALIFICATIONS.)

(3) Precoordinated Upward UFs

Upward UF references cause no problem as single-word or multiword constructions that directly parallel the words or component concepts of a main term.

```
ADHESIVES
  UF    CEMENTS (ADHESIVES)
        GLUES
        PASTES (ADHESIVES)
        SEALANTS
        STICKERS

NONTRADITIONAL EDUCATION
  SN    EDUCATIONAL PROGRAMS THAT ARE
        OFFERED AS ALTERNATIVES WITHIN OR
        WITHOUT THE FORMAL EDUCATIONAL
        SYSTEM AND PROVIDE INNOVATIVE AND
        FLEXIBLE INSTRUCTION, CURRICULUM,
```

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```
          GRADING SYSTEMS, OR DEGREE
          REQUIREMENTS
      UF  ALTERNATIVE EDUCATION
          ALTERNATIVE SCHOOLS (1972 1980)
          EDUCATIONAL ALTERNATIVES (1974 1980)
          INSTRUCTIONAL ALTERNATIVES
          TEACHING ALTERNATIVES
          TRAINING ALTERNATIVES
```

(Note: The qualifier "adhesives" was necessary in two instances of the first example to avoid so-called "downward" UFs (i.e., from a broader to a narrower concept); downward UFs are serious errors in the "terminology terrain" of a thesaurus.)

However, precoordinated upward UFs that add a new concept, one not directly related to the component concepts of a main term, can cause confusion when they are interpreted too "literally" by indexers and searchers. This problem can best be illustrated with an example.

```
ACADEMIC ENRICHMENT (1966 1980)
  USE ENRICHMENT

ENRICHMENT
  UF  ACADEMIC ENRICHMENT (1966 1980)
      ENRICHMENT EXPERIENCE (1966 1980)
  NT  CULTURAL ENRICHMENT
      CURRICULUM ENRICHMENT
      JOB ENRICHMENT
      LANGUAGE ENRICHMENT
      MATHEMATICAL ENRICHMENT
  RT  ENRICHMENT ACTIVITIES
```

As of 1980, the *Thesaurus* says "ACADEMIC ENRICHMENT, Use ENRICHMENT." (ACADEMIC ENRICHMENT is a former main term.) Beyond the literal command to "use ENRICHMENT," this instruction does two other things:

- It gives the user access to the "terminology terrain" of the word "academic." If one takes the USE reference too literally and uses ENRICHMENT only, access via the word "academic" could be lost. Depending on the document being indexed or the search strategy being formulated, this may or may not be important. Only the indexer or searcher can decide, based upon the particular circumstances of the document being indexed or his/her retrieval needs, whether access via the word "academic" is necessary.

- It leads the user to a display where more specific or precise terminology may be found, including, quite possibly, a more suitable term for the particular document or search strategy. Again, if the user takes the USE reference literally, ENRICHMENT will be used, possibly in lieu of more appropriate terms, e.g., CURRICULUM ENRICHMENT.

(Note: Access under ENRICHMENT is not lost if

CURRICULUM ENRICHMENT is used, certainly not in computerized retrieval with its word searching capability, but neither in manual searching if users are trained to use the *Thesaurus* properly.)

A USE reference specifies that Term "A" is not a postable concept for the ERIC indexes and that Term "B" (and sometimes Term "C") will be used instead, providing there are no contravening considerations. Thus, the indexing or searching process does not necessarily stop with the use or posting of Term "B." Users should remember that the *Thesaurus* is an access vocabulary, and that USE references merely provide a pathway to the most probable term that one might wish to use. Indexing decisions or search strategies should never be based rigidly on a USE reference alone. Before making a final decision, users should examine the surrounding "terminology terrain" and then proceed to the main term display to which a USE reference leads. To do otherwise is to engage in mere "word indexing" and defeats the utility of a structured vocabulary.

(4) Inverted Entries or Term Reversals

An early rule with respect to ERIC *Thesaurus* development specifically prohibited the use of inverted entries in cross-referencing. The reasoning behind the rule was that the Rotated Descriptor Display provides access to all words of a multiword Descriptor.

A plethora of inverted entries, of course, would be undesirable, and over the years, this rule has been followed with only rare exceptions. Some examples of inverted entries that presently exist in the *Thesaurus* are:

BATTERIES (ELECTRIC)
USE ELECTRIC BATTERIES

DIAGNOSIS
USE IDENTIFICATION

DIAGNOSIS (CLINICAL)
USE CLINICAL DIAGNOSIS

DIAGNOSIS (EDUCATIONAL)
USE EDUCATIONAL DIAGNOSIS

DISCRIMINATION (SOCIAL)
USE SOCIAL DISCRIMINATION

Justification for the "batteries" and "discrimination" reversals is a need for access at the most logical, or commonly thought of, point of entry. Support for the "diagnosis" entries is based on a perceived need to lessen indexer/searcher confusion and eliminate any possibility of term misuse.

It should be emphasized, however, that inverted entries are generally discouraged and that special demonstrable circumstances are necessary to justify them.

(5) Related-Term Type of Relationship Between a Main Term and the UF Leading To It

A main term and a UF leading to it may have the same conceptual relationship between them as two Related Terms (RTs).

Such relationships will often be precoordinated upward UFs. In the case of "GRAIN MARKETING, Use GRAINS (FOOD)," the UF is hierarchically related to the main term MARKETING and has an RT relationship to GRAINS (FOOD). The usefulness of the UF GRAIN MARKETING is strictly in preventing the concept's use as an Identifier and requiring that the more general term be used. Confusion over what to do about "marketing" in this instance can be avoided if one remembers to not take the UF "literally." MARKETING or another term to convey this aspect of the document can and should be used also, if warranted.

RT-type UF/main term relationships between "population" concepts and "condition" concepts may cause confusion as well. For instance, the *Thesaurus* instruction "VISUALLY HANDICAPPED, Use VISUAL IMPAIRMENTS" may be difficult to accept. However, experience shows that any differences that may exist between such terms cannot be consistently articulated in the indexing process.

(6) Colloquialisms

Slang and colloquialisms are ordinarily not used as UFs, particularly when the terminology of the main term is commonly known and widely used, e.g.,

MARY JANE (DRUG)
  USE MARIJUANA

STRAW BOSSES
  USE CREW LEADERS

Alternatives to some colloquial expressions, however, may not come readily to mind. Such expressions may be needed for additional access, e.g.,

BREADWINNERS
  USE HEADS OF HOUSEHOLDS

(7) Transferred Descriptors

A former indexable or main term that has been downgraded to the status of a UF term is accompanied by a "life span" notation in parentheses, e.g., "(1966 1974)." The life span notation indicates the span of time in which a term was used in indexing and is helpful in retrospectively searching older manual indexes and computer files. Transferred terms with end dates of 1980 and earlier no longer appear in the ERIC vendor files, i.e., their postings have been transferred to the preferred USE term(s). Transferred terms with end dates after 1980, however, have not been completely updated, and both old and new terms ordinarily must be searched in order to

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gather all postings. (The last complete reload of ERIC by the major database vendors was in December 1980.) There are approximately 840 terms in the "1980 and earlier" group as opposed to fewer than 100 in the "after-1980" group. The "transferred, but still searchable" group of terms is listed in commercially published editions of the ERIC *Thesaurus* (see "Transferred Descriptors" in the Table of Contents).

Examples:

STUDENT TESTING (1966 1980) USE EDUCATIONAL TESTING	(Transfer accomplished during the last vendor reload [Dec80]; only the current term needs to be searched.)
VIDEODISC RECORDINGS (1979 1986) USE VIDEODISKS	(Transfer occurred since the last vendor reload [Dec80]); both old and new terms should be searched.)

An additional parenthetical qualifier accompanies certain transferred Descriptors that, because of their unusual original wording, would appear out-of-place or even erroneous if not qualified in their new roles as UFs.

Example:

PROGRESSIVE RETARDATION (1966 1980)
(IN SCHOOL)
USE EDUCATIONALLY DISADVANTAGED

Transferred Descriptors with postings split two ways are qualified in the same manner.

Example:

PAINTING (1966 1980) (ARTISTIC) USE PAINTING (VISUAL ARTS)	PAINTING (1966 1980) (INDUSTRIAL) USE PAINTING (INDUSTRIAL ARTS)

(This situation is not to be confused with Descriptors whose postings were each transferred to two other Descriptors and are now "double UFs"--See next section.) The qualifiers in the above examples were not attached to the original Descriptors; therefore, they follow the life span notations. Qualifiers that were part of original Descriptors precede the life span notations.

Example:

```
CARDIAC (PERSON) (1968 1980)
 USE    HEART DISORDERS
```

(8) Multiple UFs

The multiple USE reference capability allows for the specification of a concept by up to five term coordinations.

A pound sign (#) following a UF term signifies that two or more main terms are to be used in coordination to represent that UF.

Example:

```
ATHLETICS
  SN SPORTS, GAMES, OR PHYSICAL
     CONTESTS OFTEN ENGAGED IN
     COMPETITIVELY
  UF ATHLETIC ACTIVITIES (1966 1974)
     ATHLETIC PROGRAMS (1966 1980)
     SPORTS
     SPORTS NEWS #
     SPORTS REPORTING #

COLLEGE ATHLETICS
  UF INTERCOLLEGIATE ATHLETICS #
```

A footnote warning users that at least two terms are required to retrieve these flagged concepts appears on every page of the *Thesaurus* Alphabetical Display. This footnote reads as follows:

= TWO OR MORE DESCRIPTORS ARE USED TO REPRESENT THIS TERM.
THE TERM'S MAIN ENTRY SHOWS THE APPROPRIATE COORDINATION.

To determine the proper coordination for a multiple UF, the user needs only to consult the UF's reciprocal USE reference (i.e., main entry) in the Alphabetical Display. The reciprocals or main entries for the three multiple UFs given above would be:

```
INTERCOLLEGIATE ATHLETICS             SPORTS NEWS          SPORTS REPORTING
 USE    COLLEGE ATHLETICS              USE    ATHLETICS     USE    ATHLETICS
 and    INTERCOLLEGIATE COOPERATION    and    NEWS MEDIA    and    NEWS REPORTING
```

Multiple UFs should not be used for concepts having high search interest. Direct and specific Descriptors are most necessary and desirable in areas of high search interest, to ensure ease and precision for manual retrieval.

Many existing multiple UFs reflect former precoordinated main terms that had low utility and whose postings were transferred to two broader terms.

Example:

```
REMEDIAL ARITHMETIC (1966 1980)
 USE    ARITHMETIC
 and    REMEDIAL MATHEMATICS
```

As explained in the immediately preceding discussion on "Transferred Descriptors," terms like the above with end dates of 1980 or earlier have been replaced by their preferred Descriptors and are no longer computer-searchable; alternatively, those with end dates of 1981 or later may still exist in the database and, therefore, need to be included in comprehensive search strategies.

Users should be cautioned to be flexible in their use and interpretation of multiple UFs. Like other UFs, multiple UFs can sometimes be taken too "literally." For instance, one of the multiple UFs illustrated above says:

SPORTS NEWS, Use ATHLETICS <u>and</u> NEWS MEDIA

ATHLETICS has many narrower terms or NTs, one of which is FOOTBALL. NEWS MEDIA also has some NTs, including NEWSPAPERS. Remembering ERIC's policy to index to the most specific available Descriptor, the concept "football news" should obviously be indexed with FOOTBALL and NEWS MEDIA, not also with ATHLETICS. For the even narrower concept "football newspapers," NEWSPAPERS should be used, not NEWS MEDIA.

(9) Disallowance of UFs as Postable Terms

UFs are <u>never</u> to be used as index postings in ERIC records, either in the Descriptor field or as Identifiers.

Any indexer or user who disagrees with a UF, and can see a need to post it, should request a *Thesaurus* change via the procedures in item E.5.d. Reasons for requesting such a change might include the following:

- A broad Descriptor is continually being posted for documents that really pertain to the more specific subject of a UF.
- An outmoded Descriptor is being posted for more contemporary terminology represented by a UF.
- A Descriptor is being misused for different subjects because of a broad or otherwise inappropriate UF.

All errant UFs should, of course, be removed from the *Thesaurus*. UFs so removed would then be acceptable for posting.

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6. Narrower Terms/Broader Terms

a. General

Narrower Term/Broader Term (NT/BT) notations are used to indicate hierarchical relationships among Descriptors. Because they are Descriptors, NTs and BTs are indexable and searchable. More than any other feature, hierarchies distinguish a systematic thesaurus from other organized lists of terms. They provide the capability for fine-tuning the indexing and searching processes to the most appropriate level of subject specificity.

Hierarchical relationships are structured using the taxonomic concept of "class membership." Placement of terms within hierarchies helps to define the terms and limits their possible indexing and searching applications.

Narrower Terms represent concepts totally included in the broader class listed above them in the hierarchy.

Example: READING
NT ORAL READING
SILENT READING

Broader Terms include as a subclass each concept represented by a Narrower Term in the hierarchy.

Examples: ORAL READING
BT READING

SILENT READING
BT READING

BTs and NTs have a mandatory reciprocal relationship. Sometimes a term may have more than one Broader Term.

Example: MIGRANT CHILDREN
BT CHILDREN
MIGRANTS

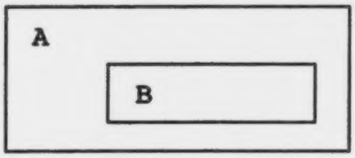
b. Generic Structuring

Generic structuring involves organizing Descriptors into "hierarchical families." A single hierarchical family is made up of a class or category of concepts and each of its members. Thus, the relationship is the same as that between a thing and its types, or, in zoological terms, a genus and its member species. In ERIC, and many other contemporary information systems, this is the BT/NT relationship.

(1) BT/NT Relationship

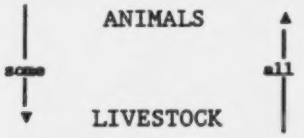
ERIC Descriptors are names (or tags) for classes of information, and a NARROWER TERM of a given Descriptor is simply a subclass within the scope of that given Descriptor, as illustrated below:

Example 1:



If A and B represent terms in the *Thesaurus*, then B is a narrower term to Term A, because all members of the class represented by Term B are also members of the class represented by Term A. The corresponding reciprocal statement is, of course, that Term A is a broader term to Term B because, while it has members which are not members of Term B, it does include all members of Term B.

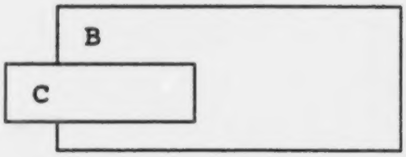
The so-called "all-and-some test" is useful in determining whether terms are related in this manner. In one of the ERIC hierarchies, using Example 1, A = ANIMALS and B = LIVESTOCK. The BT/NT relationship of these terms passes the test as represented by the following diagram:



i.e.,
some animals
are livestock;
all livestock
are animals.

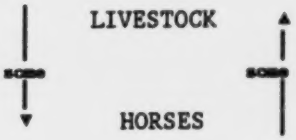
On the other hand, two terms where each has only some members in common with the other (i.e., a class overlap) would be illustrated as follows:

Example 2:



In this example, Term C is not a narrower term to Term B, nor is Term B a broader term to Term C, because although the terms have members in common, all of the members of Term C are not also members of Term B.

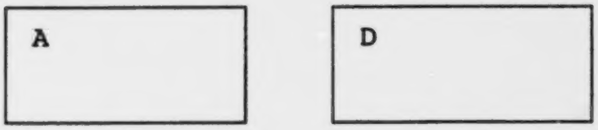
Example 2 can be illustrated with the ERIC terms LIVESTOCK (= B) and HORSES (= C). Using the "all-and-some test":



i.e., some horses are livestock; some livestock are horses, but all horses are not livestock; all livestock are not horses.

Two terms representing totally different types of things such as actions, objects, properties, fields of study, etc., obviously cannot pass the "all-and-some test" and, therefore, cannot logically be hierarchical.

Example 3:

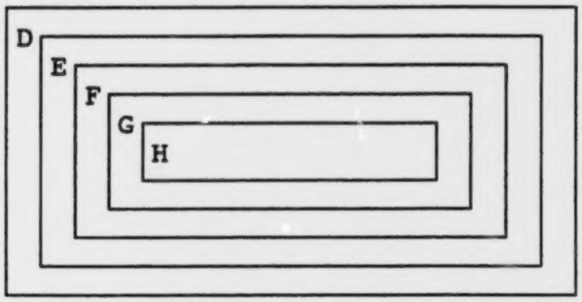


A pair of terms such as ANIMALS and ANIMAL HUSBANDRY, or HORSES and HORSEBACK RIDING, may be considered associated, but not associated hierarchically. (For "associative relationships," see section D.7 on "Related Terms.")

(2) Hierarchical Levels and Branches

There can be many levels in a hierarchy, as in the following example:

Example 4:



Term F lies in the middle of this hierarchy with two broader terms and two narrower terms. These levels would appear in the *Thesaurus* Alphabetical and Hierarchical Displays like this:

Alphabetical Display	Hierarchical Display
Term F	::Term D
NT Term G	:Term E
BT Term E	Term F
	.Term G
	..Term H

Invalid multiple entries or unintentional splits can occur in the Hierarchical Display if care is not taken in BT/NT structuring. Terms should be entered in the *Thesaurus* file with only their most immediate broader and narrower terms cited, i.e., in the same manner in which they will appear in the Alphabetical Display. In Example 4, if Term F were entered citing both D and E as broader terms and G and H as narrower terms, the Hierarchical Display, interpreting this as meaning D and E are at the same level of broadness and G and H are at the same level of narrowness, would contain incorrect double entries.

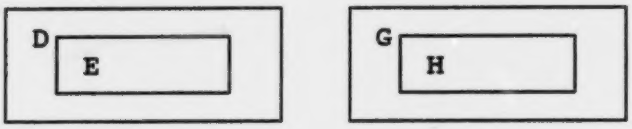
:Term D] - Incorrect Double Entry
::Term D
:Term E
Term F
.Term G
..Term H
.Term H] - Incorrect Double Entry

On the other hand, assume that Terms D through H are members of an existing hierarchy and that new Term "X" needs to be inserted between F and G. The input of Term X would correctly carry the BT Term F and the NT Term G. But, in addition, the previous (now invalid) relationship between F and G would need to be expunged. Otherwise, the following faulty hierarchy would result:

Term D
.Term E
..Term F
...Term G] - Incorrect Double Entry
...Term X
....Term G
.....Term H

The inverse situation occurs if a term is deleted from the middle of a hierarchy. For instance, if Term F were deleted from the Example 4 hierarchy or purged altogether from the *Thesaurus*, a second transaction would be necessary in order to maintain the BT/NT relationship between Terms E and G. Otherwise, a hierarchical "split" would result and leave two independent and seemingly unrelated hierarchies, as in Example 5.

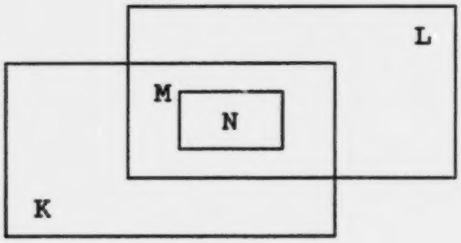
Example 5:

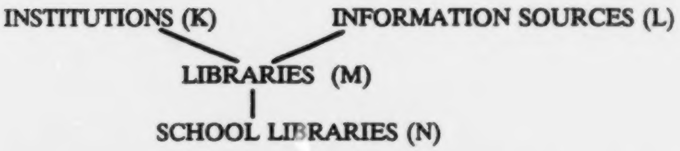


Example 4 illustrates a hierarchy with many levels, each with only one immediately adjacent BT or NT relationship. Although only the next higher (BT) or lower (NT) level is used in generic structuring, this does not mean that a term is limited to one BT or NT.

A given term may be a member of two entirely separate hierarchies. Example 6 illustrates this characteristic, sometimes called a *polyhierarchical relationship*:

Example 6:

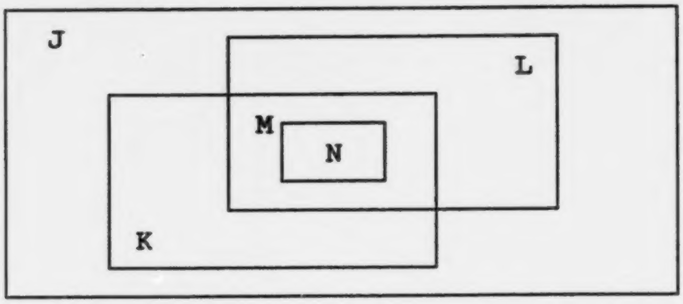


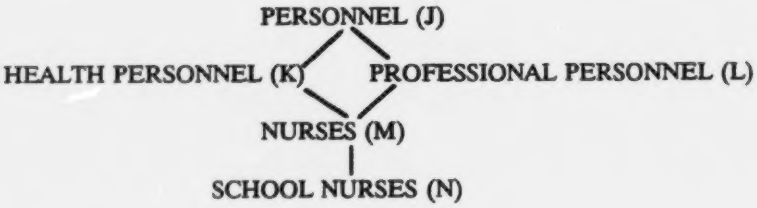


Terms K and L are both immediately broader to Term M and should be so displayed. Term M (and its NT, Term N) will then properly appear in both hierarchies. Below the example are four ERIC Descriptors, arranged to further illustrate this relationship.

Example 7 illustrates the possibility of Terms K, L, M, and N appearing together in one hierarchy:

Example 7:




PERSONNEL (J)
HEALTH PERSONNEL (K)
PROFESSIONAL PERSONNEL (L)
NURSES (M)
SCHOOL NURSES (N)

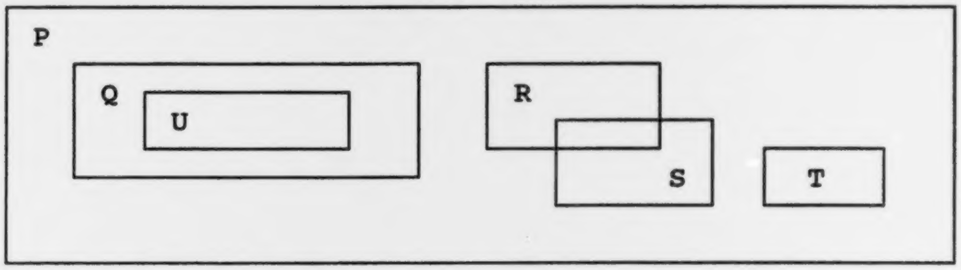
Term J encompasses Terms K through N. Once again, ERIC Descriptors are arranged below the example to further illustrate these relationships.

In this instance, Terms M and N would appear twice in the hierarchy of Term J, under both Term K and Term L. This double appearance of M and N is legitimate, since Terms K and L have no generic relationship to each other even though they share a common BT and the same NTs. A Hierarchical Display printout of this example would appear as follows:

Term J
.Term K
..Term M
...Term N
.Term L
..Term M
...Term N

As one often finds more than one BT at the next higher generic level, multiple NTs at the next lower generic level are even more common. This situation may be illustrated as follows:

Example 8:



Terms Q through T are all narrower to Term P at the next generic level and would be carried as NTs during input to the *Thesaurus* file. Only Term U would not be included during input, since it is an NT of Term Q. Its inclusion directly under Term P would cause an invalid double entry in the hierarchy.

c. **Part-Whole Relationships**

One relationship that is occasionally handled by the NT/BT structure but that cannot legitimately be called "generic" is the part-whole relationship. Parts and their wholes, if cross-referenced to each other at all, are usually related as RTs. For example, SCHOOL BUILDINGS and CAMPUSES are certainly related to one another but in the sense of a part to the whole, not a generic sense. SCHOOL BUILDINGS are a part of CAMPUSES, but are not CAMPUSES in themselves. (See section D.7 on "Related Terms.")

Part-whole NT/BT relationships, in which the "part" always and unambiguously belongs to a particular "whole," are used in many information retrieval systems. It is particularly common to see geographic locations structured in this manner (e.g., Maryland BT United States, Maryland NT Baltimore). Parts of the human body are sometimes arranged this way also (e.g., Stomach BT Digestive System, Brain NT Cerebrum).

The ERIC system indexes geographic locations as Identifiers (see Identifier section VIII-2). Identifiers are not structured in hierarchies. Also, the ERIC *Thesaurus* carries only a few Descriptors relating to the human body, and these are not structured into part-whole hierarchies. Part-whole hierarchies can be useful in structuring the relationships of a certain limited number of terms for indexing and searching. However, there are few such hierarchies in the ERIC *Thesaurus* today, and their use generally is discouraged.

d. **Possible Use Relationships**

Just as part-whole relationships are generally disregarded for BT/NT structuring, so are relationships based on the possible applications or uses of an entity. For example, the term ATLASES is not considered to be a member of the generic family INSTRUCTIONAL MATERIALS because, although ATLASES are sometimes used as INSTRUCTIONAL MATERIALS, they are not necessarily used this way. However, ATLASES are always REFERENCE MATERIALS, and an NT/BT structure here would be correct. ATLASES and INSTRUCTIONAL MATERIALS could be RTs, but since REFERENCE MATERIALS is already carried as an RT of INSTRUCTIONAL MATERIALS, the one relationship is sufficient. (See RT rules regarding proliferation, item D.7.c.(2) of this section.)

Another example of this situation is the relationship between WINDOWS and VENTILATION. WINDOWS are objects, and VENTILATION is a process, so there can be no NT/BT relationship. But, even if the latter term's form was VENTILATORS, there could still be no hierarchy, because some WINDOWS are not VENTILATORS at all, but are used for the sole purpose of LIGHTING. Usage relationships such as these---WINDOWS used for LIGHTING and VENTILATION---are carried in the ERIC *Thesaurus* as RTs.

e. Special Problems with Hierarchies

(1) Finding the Right Hierarchy

Determining the correct hierarchical placement for a particular term is usually not a difficult task. Familiarity with, and experience in using, the *Thesaurus* are valuable for generic structuring, but are not essential.

The important thing is to remember to determine *Thesaurus* precedents and to follow their examples. The attempt should be to locate parallel *Thesaurus* terms and to use their hierarchical placement as a guide. The type of term being worked on is important---does it represent action, a group of objects, a process, a subject field or discipline? A determination of "type" will narrow down considerably the hierarchical families where a particular term might fit. The proper Descriptor Group should also be determined, and existing terms in the chosen group should be examined to see where they fit in the hierarchies. Additionally, the Rotated Display should be consulted to locate terms having the same, or nearly the same, words as the term under consideration---see the hierarchies of those terms. If a proper hierarchical placement cannot be determined after these steps, other thesauri or structured word lists should be checked to see if and how they carry the particular term. (Remember, however, that the existing structure in the ERIC *Thesaurus* takes precedence and should guide the final placement of a term more than the structures of other authorities.)

If, after all of the above steps, a proper hierarchy still cannot be found, the particular term is most likely a hierarchical "isolate" (i.e., it has no NTs nor BTs).

Proper hierarchical placement requires that the scope of a particular term: (1) be within the scopes of its BTs; and (2) adequately subsumes the scopes of all its NTs. This is why it is better to leave a term in isolation than to force it into a hierarchy where it does not truly belong. Terms improperly placed in isolation may be overlooked in "subject-specific" indexing and searching; on the other hand, improper hierarchical placement can cause the incorrect term and all its NTs and BTs to be misread and misused (a more serious consequence).

(2) Hierarchical Visibility

A rule for generic structuring in item D.6.b.(2) states that terms are entered in the *Thesaurus* file citing only their <u>most immediate</u> broader and narrower terms. Without this rule, there could be no multilevel hierarchical structures (i.e., beyond <u>one</u> BT/NT level).

Terms appear in the Alphabetical Display (main display) of the *Thesaurus* just as they are entered in the file. Therefore, just as it must be remembered to enter a term with only its most immediate BTs and NTs, so it must also be remembered that the main Alphabetical Display of a term shows nothing beyond these immediate levels. Take, for example, the term PHYSICAL ACTIVITIES as it appears in the Alphabetical Display:

```
PHYSICAL ACTIVITIES
  NT  ATHLETICS
      BICYCLING
      DANCE
      EXERCISE
      HORSEBACK RIDING
      LIFTING
      RUNNING
      UNDERWATER DIVING
  BT  ACTIVITIES
```

This display shows eight NTs and one BT. Additional generic structures or more distant hierarchical relationships could, of course, be checked by examining the main display of each BT/NT cross-reference and continuing to track BTs and NTs until the most general or specific term is found. Such cross-checking is tedious and time-consuming and can be entirely avoided if the Hierarchical Display is consulted. PHYSICAL ACTIVITIES appears in this display as follows:

```
  :ACTIVITIES
PHYSICAL ACTIVITIES
  .ATHLETICS
  ..AQUATIC SPORTS
  ...DIVING
  ...SAILING
  ...SURFING
  ...SWIMMING
  ...WATER POLO
  ...WATERSKIING
  ..ARCHERY
  ..BOWLING
  ..COLLEGE ATHLETICS
  ..EXTRAMURAL ATHLETICS
  ..FENCING (SPORT)
```

```
..GOLF
..GYMNASTICS
...TUMBLING
..HANDBALL
..INTRAMURAL ATHLETICS
..LIFETIME SPORTS
..OLYMPIC GAMES
..ORIENTEERING
..RACQUET SPORTS
...BADMINTON
...RACQUETBALL
...SQUASH (GAME)
...TENNIS
..ROLLER SKATING
..SPECIAL OLYMPICS
..TABLE TENNIS
..TEAM SPORTS
...BASEBALL
...BASKETBALL
...FIELD HOCKEY
...FOOTBALL
...ICE HOCKEY
...LACROSSE
...SOCCER
...SOFTBALL
...TEAM HANDBALL
...VOLLEYBALL
...WATER POLO
..TRACK AND FIELD
..WEIGHTLIFTING
..WINTER SPORTS
...ICE HOCKEY
...ICE SKATING
...SKIING
..WOMENS ATHLETICS
..WRESTLING
.BICYCLING
.DANCE
.EXERCISE
..AEROBICS
..CALISTHENICS
..PLYOMETRICS
.HORSEBACK RIDING
.LIFTING
..WEIGHTLIFTING
.RUNNING
..JOGGING
.UNDERWATER DIVING
```

The Hierarchical Display provides complete two-way visibility of the broader-narrower relationships of every Descriptor in the *Thesaurus*. In the case of PHYSICAL ACTIVITIES, the display confirms that there is, in fact, only one BT, but it also shows a total of 58 NTs (ICE HOCKEY, WATER POLO, and WEIGHTLIFTING appear twice), including 50 additional specific terms that were not evident in the main display of the term.

Total hierarchical visibility is provided <u>only</u> by the Hierarchical Display. Indexers and searchers alike need to be familiar with this tool and encouraged to use it regularly. Consistent usage by indexers results in subjects of the appropriate level of specificity being posted to ERIC records. Assuming proper indexing, consistent usage by searchers assures precise and relevant retrieval. Failure to consult this display may cause confusion over seemingly incomplete BT/NT relationships that can result in indexing inconsistencies and consequent retrieval problems.

Indexing and searching, however, should never be performed on the basis of the Hierarchical Display alone. Full meanings and proper uses of terms cannot be determined without consulting the main Alphabetical Display, with its Scope Notes and cross-references.

(3) Hierarchical Searching

ERIC documents are indexed to the most specific available Descriptors. An NT and its BT would not normally be indexed to the same document, unless both specific and general subjects were spoken to in some detail. Thus, complete searching of a broad concept (e.g., PHYSICAL ACTIVITIES) needs to consider not only documents posted by the broad term but all documents posted by its narrower terms (e.g., LIFTING, RUNNING) as well. Relevant RTs must be considered too (e.g., PHYSICAL ACTIVITIES has the RTs PHYSICAL EDUCATION and PLAYGROUND ACTIVITIES among others).

Access to the *Thesaurus* is essential in searching. A manual searcher might look up a term like LIBRARIES and never think to consider ACADEMIC LIBRARIES, SPECIAL LIBRARIES, or other available NTs under which documents of interest might be found. And, what if the searcher looks up the BT LIBRARIES in an index journal and finds nothing? Without considering the *Thesaurus* and its NTs, it might be assumed at this first glance that the particular index journal has nothing on the subject. On the other hand, without access to the *Thesaurus*, a computer searcher might use a common word to "hit" a number of Descriptors (e.g., LIBRARIES, ACADEMIC LIBRARIES, etc.) but, at the same time, fail to find many documents indexed by cross-referenced terms not having such common words. Even in full-text computer searching, the *Thesaurus* provides many clues for alternative words, phrases, and coordination strategies.

The online and CD-ROM vendors offering access to ERIC usually include the ERIC *Thesaurus* as an online/ondisk search aid, and have the capacity to "explode" terms from the *Thesaurus*, i.e., to automatically retrieve not only specified terms, but their most immediate narrower terms as well. This would not generally include the automatic searching of entire generic trees. (See previous section on "Hierarchical Visibility" and the Descriptor PHYSICAL ACTIVITIES, an explosion of which would include its own postings plus those of its eight immediately NTs, but typically not those of the remaining 50 terms further down the hierarchy.)

(4) Rule of Specificity

Just as the "rule of specificity" comes into play in the indexing process, it must be a consideration in generic structuring as well.

Basically, the rule as applied to indexing states that documents will be indexed to the specific level of subject matter with which they deal, and will not also be "indexed up" to a higher generic level, except in instances where generalities and particulars are handled together in the same material. Indexing "specifically" gives a searcher, armed with the *Thesaurus*, the maximum number of options, i.e., the searcher may request those items indexed by:

- an NT alone;
- its BT alone;
- either the NT or its BT;
- both the NT and BT.

If the rule of specificity is not observed, the searcher has fewer options. This principle is discussed in more detail in Section VII of this manual, under the subitem entitled "Indexing Specificity."

However, the rule of "specificity" applies only to indexing with Descriptors since only Descriptors have comprehensive NT/BT structures.

Identifiers are not hierarchically related to Descriptors. Therefore, as the examples below illustrate, specific Identifiers are often assigned concurrently with generic or conceptually broader Descriptors.

Examples:

```
IDEN_Oklahoma
DESC_State Programs; State Surveys

IDEN_Test of English as a Foreign
     Language
DESC_Language Tests; Second
     Language Learning

IDEN_Individuals with Disabilities
     Education Act
DESC_Children; Disabilities;
     Federal Legislation; Federal
     Programs

IDEN_Apollo Program
DESC_Aerospace Technology; Lunar
     Research
```

```
IDEN_Cricket (Sport)
DESC_Team Sports

IDEN_Algonquian Languages
DESC_American Indian Languages

IDEN_Water Rights
DESC_Conservation (Environment);
     Legal Problems; Water
     Resources

IDEN_Analogical Reasoning
DESC_Logical Thinking

IDEN_Inventory Control
DESC_Bookkeeping; Data Processing
     Occupations; Office
     Management; School
     Accounting

IDEN_Confidence Intervals
     (Statistics)
DESC_Error of Measurement;
     Predictive Measurement;
     Risk; Statistical
     Analysis; Test
     Reliability

IDEN_Country Music
DESC_Music

IDEN_Shoplifting
DESC_Stealing

IDEN_Hope
DESC_Emotional Response;
     Expectation;
     Psychological Patterns;
     Trust (Psychology)
```

Emerging subjects or concepts in the literature that have the characteristics of Descriptors, but which have not yet been added to the *Thesaurus*, should not be permitted to linger for long in the Identifier field. Because of the "indexing to the specific Descriptor" rule, Identifier indexing does not allow generic/specific distinctions and, without the guidance of hierarchical and related-term structures, can be very inconsistent. It is not hard to see that a group of indexers will more readily agree on how to index a particular document, if most of the appropriate vocabulary is controlled and structured. On the other hand, indexing disagreements are more likely when a large percentage of a system's indexing vocabulary is based on a simple alphabetical list of (theoretically unlimited) term choices.

Excluding the first four examples, each of the above Identifiers has the characteristics of a Descriptor and might be considered as a candidate for the ERIC *Thesaurus*. A Clearinghouse's general rule of thumb should be to start thinking of a term's *Thesaurus* "fit" after about 5 postings, and to have a *Thesaurus* input form in the mail to the Facility after about 10 postings.

7. Related Terms

a. General

Related Terms (RTs) are cross-references that are neither hierarchical (BT/NT) nor equivalent (USE/UF) but are essential for informing users of alternative terms for indexing/locating documents on given subjects. An RT relationship exists when there is a strong conceptual bond between two terms, which sometimes, but not always, is reflected by concurrent usage in the literature.

The RT relationship is always reciprocal or two-sided, as the two examples given below show:

```
CHILD ABUSE
  UF ABUSED CHILDREN
  BT ANTISOCIAL BEHAVIOR
  RT CHILD WELFARE
     CHILDREN
```

```
CHILD WELFARE
  BT WELL BEING
  RT ADOPTED CHILDREN
     CHILD ABUSE
     CHILDREN
```

b. Categories of RTs

(1) Defined by Engineers Joint Council (EJC), 1966

Sometimes called the "associative relationship," the RT has been referred to as "vague" and "difficult to define," and it is universally acknowledged that assignments must be somewhat subjective. Various rules and principles have developed over the years that indexers or lexicographers can consider in establishing RTs. Some of the clearest and best guidance in the area, however, was written over 25 years ago. The following paragraph from American National Standard Z39.19-1974 is a slightly modified version of an earlier writeup in *Thesaurus Rules and Conventions*, published by the Engineers Joint Council (New York) in November 1966. The examples, however, are ERIC's.

> "The RT reference is employed as a guide from a given term to other terms that are closely related in ways other than the genus-species (BT-NT) relationship. In general, any two terms bear the cross-reference RT to each other if it is believed that the user, when examining one of them, might

want to be reminded of the existence of the other. RT references may be used to identify relationships such as the following:

- Terms that are near-synonyms

  ACHIEVEMENT/PERFORMANCE
  BIRTH/REPRODUCTION (BIOLOGY)
  CURRICULUM GUIDES/TEACHING GUIDES
  EDUCATION/INSTRUCTION
  ORAL READING/READING ALOUD TO OTHERS

- Terms that have viewpoint [or practical] interrelationships, such as a relationship based on usage

  ARITHMETIC/FRACTIONS
  ARTISTS/PAINTING (VISUAL ARTS)
  CHILDREN/PLAY
  COST INDEXES/INFLATION (ECONOMICS)
  CULTURE FAIR TESTS/TEST BIAS
  HEALTH/DISEASES
  HEALTH FACILITIES/MEDICAL SERVICES
  HUNGER/NUTRITION
  WINDOWS/VENTILATION

- Terms representing concepts bearing a whole-part relationship to each other

  BUILDINGS/ROOFING
  HUMAN BODY/CARDIOVASCULAR SYSTEM
  INTERNATIONAL RELATIONS/DISARMAMENT
  SCHOOL CATALOGS/COURSE DESCRIPTIONS

- Terms that represent overlapping concepts

  CIVIL LIBERTIES/JUSTICE
  CREDIBILITY/INTEGRITY
  DRUG EDUCATION/DRUG REHABILITATION
  GEOGRAPHY/CARTOGRAPHY
  SOCIAL PSYCHOLOGY/CRIMINOLOGY
  SPECIFICATIONS/CRITERIA

(2) Defined by Other Authorities

Other authorities which elaborate the RT relationship and provide useful examples are:

- Barhydt & Schmidt. *Information Retrieval Thesaurus of Education Terms*. Cleveland: Press of Case Western Reserve Univ. , 1968. pp 15-18.

- Lancaster. *Vocabulary Control for Information Retrieval*. Arlington, VA: Information Resources Press.

  ---- 1986, 2nd ed. pp 45-49.

  ---- 1972, 1st ed. pp 80-85
  (Includes the Barhydt/Schmidt discussion).

- National Information Standards Organization (NISO). *American National Standard Guidelines for the Construction, Format, and Maintenance of Monolingual Thesauri.* Bethesda, MD: 1990. (ANSI/NISO Z39.19-199x) pp 50-55.

- Aitchison & Gilchrist. *Thesaurus Construction—A Practical Manual.* Second edition. London: Aslib, 1987. pp 45-50

- UNESCO. *SPINES Thesaurus.* Vol. I. English/Multilingual edition of the 1984 revision. Paris: 1988. pp xiv.

- Borko & Bernier. *Indexing Concepts and Methods*. New York: Academic Press, 1978. pp 29-30.

These few sources, constituting about all that has been written on the subject of RTs, provide an appreciation and understanding of the complexities of RT relationships. Each source defines somewhat different categories of RTs, but all are variations on the four basic EJC categories given above. Some of the other categories of RT relationship to be found in these works (again, the examples are ERIC's) are:

- Field of Study and Items Studied

  CHEMISTRY/ATOMIC STRUCTURE
  PSYCHIATRY/MENTAL HEALTH
  SEX EDUCATION/VENEREAL DISEASES

- Near Antonyms (Interactive)

  DEDUCTION/INDUCTION
  FAILURE/SUCCESS
  MARRIAGE/DIVORCE

  ---- A Thing and Its Counter Agent

  RATS/PESTICIDES

- Cause and Effect

  DEATH/WIDOWED
  LEARNING/SCHOLARSHIP

- A Thing and Its Producing Agent

  INSURANCE/RISK
  LONELINESS/SOCIAL ISOLATION
  POPULAR CULTURE/MASS MEDIA
  VIOLENCE/REVOLUTION

  ---- Product and Process

  ORAL HISTORY/INTERVIEWS
  PHOTOGRAPHS/PHOTOGRAPHY
  READERS THEATER/ORAL INTERPRETATION
  TECHNOLOGICAL ADVANCEMENT/INVENTIONS

  ---- Process and Responsible Group

  AGRICULTURE/FARMERS
  SUPERVISION/SUPERVISORS

- A Thing and Its Recipient or User

  CHILD WELFARE/FOSTER CHILDREN
  SEASONAL EMPLOYMENT/MIGRANT WORKERS
  SEWING MACHINE OPERATORS/FASHION INDUSTRY

- A Thing and Its Purpose or What It Characterizes

  BIBLIOGRAPHIES/BOOKS
  LOCAL GOVERNMENT/COMMUNITY SERVICES
  MARRIAGE COUNSELING/MARITAL INSTABILITY
  TEACHING MACHINES/PROGRAMED INSTRUCTION
  TOYS/PLAY

- Having the Same Broad Term and Overlapping Conceptually (sometimes referred to as "siblings"; often used interchangeably)

  AMERICAN INDIANS/CANADA NATIVES
  PARENTS/FAMILY (SOCIOLOGICAL UNIT)
  RETAILING/MERCHANDISING
  RHETORIC/SPEECH

The above categories illustrate the most common RT relationships. No attempt has been made to describe every conceivable type of RT. Lancaster states that "in a sense, every thesaurus term is related to every other thesaurus term at varying strengths of semantic association." The task of the indexer or lexicographer, then, in developing an RT display, is to try to include those terms that are sufficiently closely related to be of obvious benefit to users of the ERIC *Thesaurus*.

c. Selection of RTs for a Term Display

(1) Establishing a List of Candidate RTs

It is recommended that you do not start by trying to fit the concept you are working on into predetermined RT categories such as the ones described above. Instead, break the concept down into the various ways it can be used or expressed. (For example, BOOKS are written, published, reviewed, serialized, listed in bibliographies, housed in libraries, etc.) Make a list of all potential RTs as you think of them.

Now, look at the Scope Note you developed for the concept and definitions you consulted, and add key words and phrases from these to your list. You may want to expand your list by looking at other thesauri to see how they express and display your concept. Also of value is a check to see if the concept appears as an Identifier or in the text of ERIC records. Full-text and Identifier searches of the file, to examine the indexing terms assigned to the retrieved records, are recommended for this purpose. You should now have a reasonably complete list of alternative words and phrases that are available for expressing your concept and for putting it into a proper thesaurus context.

You are now ready to begin structuring RTs for your concept. First, match all terms on your list with existing Descriptors in the *Thesaurus*. You will then have a new list of terms to work from, and your original list of terms may be set aside. From this point on, you are working with legitimate ERIC Descriptors.

Go Descriptor-by-Descriptor down your new list, looking at the full display of each term. In doing this, you will undoubtedly find other Descriptors that you initially did not consider. Add these to your list. The main thing that you'll be trying to decide by this exercise is whether your concept fits comfortably in each of the various displays of the candidate RTs under examination. Consider your concept's hierarchical siblings (other Descriptors from the hierarchy(s) you chose for your concept, especially those at the same hierarchical level) and other Descriptors that are grammatical variations of your concept and its synonyms (e.g., gerunds, adjectival variations, etc.). Do they appear in a given display? If not, your concept probably does not belong there.

On finishing this exercise, you will have a third list of Descriptors which, in all probability, will be your final list of recommended RTs. However, it is usually helpful to go through the list once more to look for conceptual "holes" or "displacements." A look at the *Rotated Display* is helpful here. Ask yourself during this check if broader or single-word Descriptors can better express the relationships you want to convey than the more specific terms you are considering.

(2) Avoiding Proliferation of RTs

It is very important to avoid proliferating RTs since no one can effectively use excessively long displays. Often, one RT cross-reference at the broad conceptual level can better express the desired relationship than several more specific references. In this regard, the maxim known as "Ockham's Razor" is useful to keep in mind.

> Ockham's Razor...
>
> *"Multiplicity ought not to be posited without necessity."*
>
> William of Ockham
> (philosopher, early 14th century)

For example, if HISTORY INSTRUCTION is related to HISTORY, it does not also need to be related to UNITED STATES HISTORY, MODERN HISTORY, BLACK HISTORY, etc. Additional examples are given below of ways to avoid proliferation in the RT field:

- Avoid proliferation. In the example below, STUDENT CHARACTERISTICS could conceivably be related to STUDENTS and all of its Narrower Terms, but a single cross-reference to STUDENTS is all that's necessary.

```
Preferred        STUDENTS
                   RT   STUDENT CHARACTERISTICS

Not Preferred    PART TIME STUDENTS
                   RT   STUDENT CHARACTERISTICS
```

- Try to select the proper hierarchical level for your cross-references. For example, DUAL ENROLLMENT and SHARED RESOURCES AND SERVICES are best related to INSTITUTIONAL COOPERATION, and not also to the narrower INTERCOLLEGIATE COOPERATION.

```
Preferred        INSTITUTIONAL COOPERATION
                   RT   DUAL ENROLLMENT
                        SHARED RESOURCES AND SERVICES

Not Preferred    INTERCOLLEGIATE COOPERATION
                   RT   DUAL ENROLLMENT
                        SHARED RESOURCES AND SERVICES
                 INSTITUTIONAL COOPERATION
                   RT   DUAL ENROLLMENT
                        SHARED RESOURCES AND SERVICES
```

- Try to select the simplest, most direct term, particularly when deciding among several potential terms in the same alphabetic sequence.

Preferred	VERBAL COMMUNICATION RT READING
Not Preferred	VERBAL COMMUNICATION RT READING MATERIALS VERBAL COMMUNICATION RT READING SKILLS

- Try to select the most subject-specific relationship available among several possible terms.

Preferred	INTERNATIONAL EDUCATIONAL EXCHANGE RT INTERNATIONAL PROGRAMS STUDENT EXCHANGE PROGRAMS STUDY ABROAD INTERNATIONAL PROGRAMS RT INTERNATIONAL EDUCATIONAL EXCHANGE
Not Preferred	INTERNATIONAL EDUCATIONAL EXCHANGE RT INTERNATIONAL PROGRAMS STUDENT EXCHANGE PROGRAMS STUDY ABROAD INTERNATIONAL PROGRAMS RT INTERNATIONAL EDUCATIONAL EXCHANGE STUDENT EXCHANGE PROGRAMS STUDY ABROAD

Preferred	DISARMAMENT RT INTERNATIONAL RELATIONS PEACE RT INTERNATIONAL RELATIONS
Not Preferred	DISARMAMENT RT INTERNATIONAL PROGRAMS INTERNATIONAL RELATIONS PEACE RT INTERNATIONAL PROGRAMS INTERNATIONAL RELATIONS

- Avoid improperly slanting or restricting a term. For example, PART TIME STUDENTS may be enrolled at all educational levels.

Not Preferred	PART TIME STUDENTS RT ADULT STUDENTS

(3) RT Lists as Mini-Indexes

There are occasional situations where abundant RTs may be useful and valid. RTs can provide mini-indexes to some of the *Thesaurus*' most general terms. This is why broad terms like BEHAVIOR, BLACKS, COLLEGES, COMMUNITY, READING, etc., acquire long RT displays. This is particularly helpful for the beginning *Thesaurus* user who usually has a nominal concept in mind and needs to know the various combinations in which that concept is displayed in adjectival form. It could be argued that the "Rotated Display" should be used for this purpose, but such "selective" proliferation has become standard practice in most thesauri. Additionally, the conceptual relationships among terms in these situations are often not clear-cut. For example, who would want to argue that COMMUNITY ATTITUDES and COMMUNITY ROLE have a closer conceptual relationship to COMMUNITY than COMMUNITY LEADERS and COMMUNITY SCHOOLS? It is easier and less confusing in these cases to simply list all such RT relationships under the broad, most general terms.

E. Vocabulary Development Form

The Vocabulary Development Form is provided for the convenient recording and processing of all changes to the *Thesaurus*, whether additions of new Descriptors, modifications of existing Descriptor displays, or Descriptor deletions (purges). All justification information is recorded on the form, including both authorities cited and personal contacts. Space is provided for indicating any RIE and CIJE postings changes that are necessary to keep the *Thesaurus* and postings files synchronous. Characteristics of the Vocabulary Development Form and requirements for completing it are discussed in the following paragraphs.

1. Pre-Printed Vocabulary Development Forms or Computer-Prepared Substitutes?

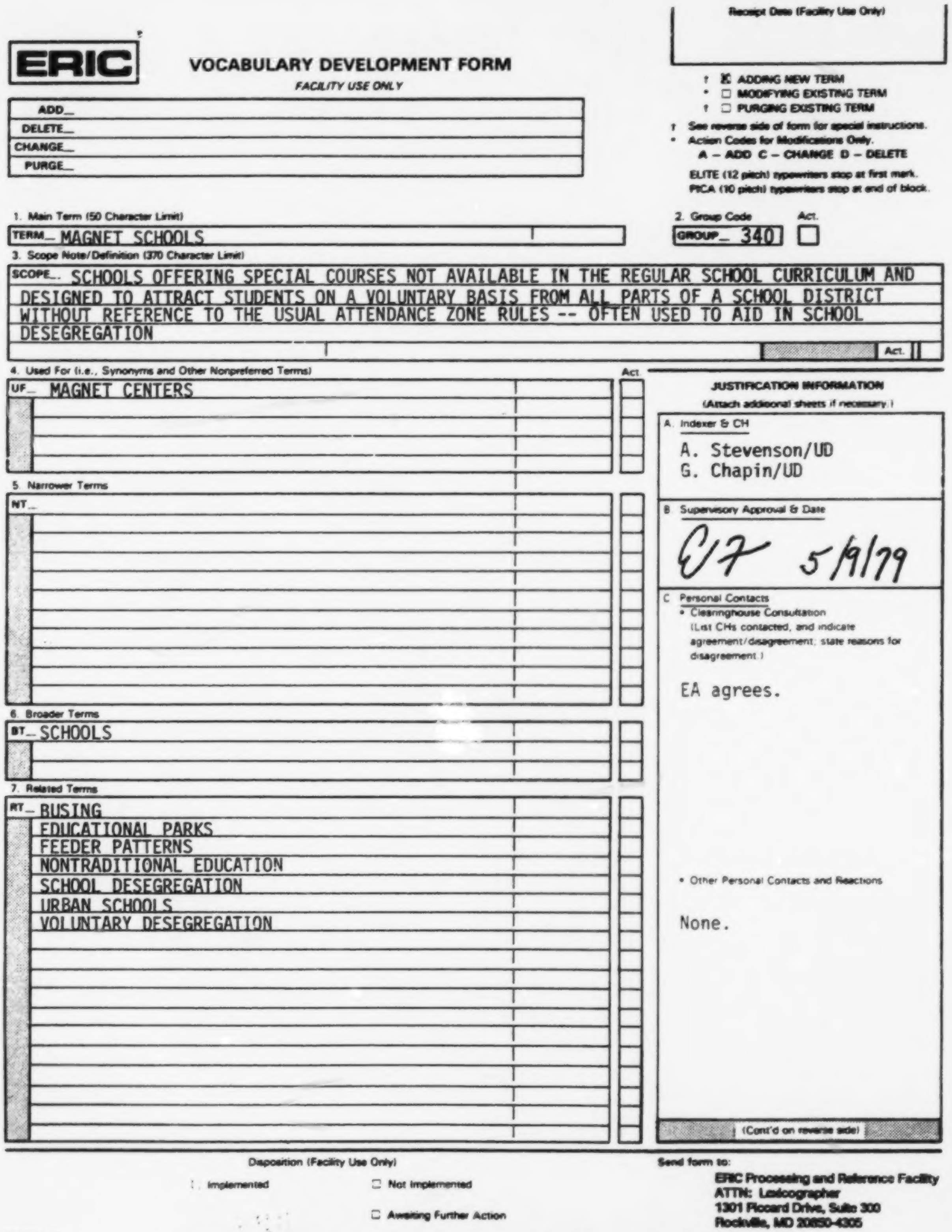
Thesaurus additions and changes may be prepared either on pre-printed vocabulary forms or on computer-prepared substitutes. Any computer-prepared forms used should be arranged similarly to the pre-printed forms and contain the same data elements.

The pre-printed Vocabulary Development Form (2-sided) is illustrated in **Figure VIII-1-8**. This is a completed version of the form, showing its use for adding a new Descriptor. The form was introduced in 1980 as part of the new Vocabulary Development Program (see item "B.3"). Its design is similar to ERIC's earlier "Descriptor Justification Form (DJF)," a version of which is shown in **Figure VIII-1-ATT-1-1**. The line spacing is set up for any standard typewriter, so that when the form is lined up for entry of the Main Term, it should not be necessary to adjust the typewriter subsequently.

An example of a microcomputer-prepared template of the Vocabulary Development Form (in WordPerfect 5.1) is illustrated in **Figure VIII-1-9**. Both a blank copy and a completed version are shown. Two additional examples of what completed VDF templates look like are shown in **Attachment #2** of this section. Whether such templates are unique to a particular indexer or whether they are designed for use by everyone in a Clearinghouse, or across several Clearinghouses, is immaterial, as long as the required data elements are present.

The decision on whether to use the pre-printed form, to generate one independently, or to share one with others, is left to individual discretion.

627



Receipt Date (Facility Use Only)

ERIC VOCABULARY DEVELOPMENT FORM

FACILITY USE ONLY

ADD_
DELETE_
CHANGE_
PURGE_

† ☒ ADDING NEW TERM
* ☐ MODIFYING EXISTING TERM
† ☐ PURGING EXISTING TERM

† See reverse side of form for special instructions.
* Action Codes for Modifications Only.
A – ADD C – CHANGE D – DELETE

ELITE (12 pitch) typewriters stop at first mark.
PICA (10 pitch) typewriters stop at end of block.

1. Main Term (50 Character Limit)
TERM_ MAGNET SCHOOLS

2. Group Code
GROUP_ 340
Act. ☐

3. Scope Note/Definition (370 Character Limit)
SCOPE_ SCHOOLS OFFERING SPECIAL COURSES NOT AVAILABLE IN THE REGULAR SCHOOL CURRICULUM AND DESIGNED TO ATTRACT STUDENTS ON A VOLUNTARY BASIS FROM ALL PARTS OF A SCHOOL DISTRICT WITHOUT REFERENCE TO THE USUAL ATTENDANCE ZONE RULES -- OFTEN USED TO AID IN SCHOOL DESEGREGATION
Act. ☐

4. Used For (i.e., Synonyms and Other Nonpreferred Terms) Act.
UF_ MAGNET CENTERS

5. Narrower Terms
NT_

6. Broader Terms
BT_ SCHOOLS

7. Related Terms
RT_ BUSING
EDUCATIONAL PARKS
FEEDER PATTERNS
NONTRADITIONAL EDUCATION
SCHOOL DESEGREGATION
URBAN SCHOOLS
VOLUNTARY DESEGREGATION

JUSTIFICATION INFORMATION
(Attach additional sheets if necessary.)

A. Indexer & CH
A. Stevenson/UD
G. Chapin/UD

B. Supervisory Approval & Date
5/9/79

C. Personal Contacts
- Clearinghouse Consultation
(List CHs contacted, and indicate agreement/disagreement; state reasons for disagreement.)

EA agrees.

- Other Personal Contacts and Reactions

None.

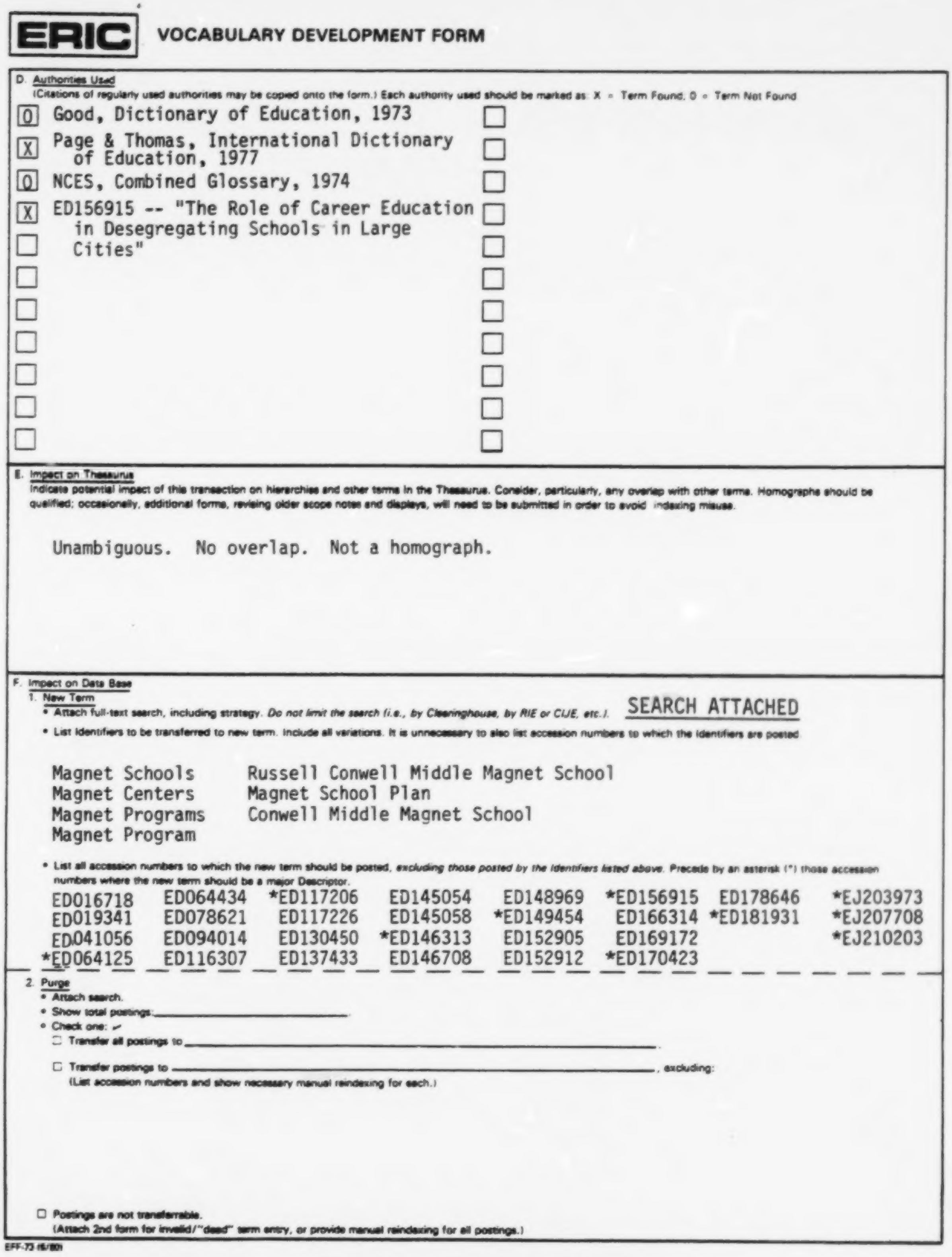
(Cont'd on reverse side)

Disposition (Facility Use Only)
☐ Implemented ☐ Not Implemented
☐ Awaiting Further Action

Send form to:
ERIC Processing and Reference Facility
ATTN: Lexicographer
1301 Piccard Drive, Suite 300
Rockville, MD 20850-4305

EFF-73 (6/80)

FIGURE VIII-1-8: VOCABULARY DEVELOPMENT FORM
(Example of Completed New Term Recommendation)



ERIC VOCABULARY DEVELOPMENT FORM

D. Authorities Used
(Citations of regularly used authorities may be copied onto the form.) Each authority used should be marked as: X = Term Found, 0 = Term Not Found

[0] Good, Dictionary of Education, 1973 ☐
☒ Page & Thomas, International Dictionary of Education, 1977 ☐
[0] NCES, Combined Glossary, 1974 ☐
☒ ED156915 -- "The Role of Career Education in Desegregating Schools in Large Cities" ☐

E. Impact on Thesaurus
Indicate potential impact of this transaction on hierarchies and other terms in the Thesaurus. Consider, particularly, any overlap with other terms. Homographs should be qualified; occasionally, additional forms, revising older scope notes and displays, will need to be submitted in order to avoid indexing misuse.

Unambiguous. No overlap. Not a homograph.

F. Impact on Data Base
1. New Term
- Attach full-text search, including strategy. *Do not limit the search (i.e., by Clearinghouse, by RIE or CIJE, etc.).* SEARCH ATTACHED
- List Identifiers to be transferred to new term. Include all variations. It is unnecessary to also list accession numbers to which the Identifiers are posted.

Magnet Schools	Russell Conwell Middle Magnet School
Magnet Centers	Magnet School Plan
Magnet Programs	Conwell Middle Magnet School
Magnet Program	

- List all accession numbers to which the new term should be posted, *excluding those posted by the Identifiers listed above.* Precede by an asterisk (*) those accession numbers where the new term should be a major Descriptor.

ED016718	ED064434	*ED117206	ED145054	ED148969	*ED156915	ED178646	*EJ203973
ED019341	ED078621	ED117226	ED145058	*ED149454	ED166314	*ED181931	*EJ207708
ED041056	ED094014	ED130450	*ED146313	ED152905	ED169172		*EJ210203
*ED064125	ED116307	ED137433	ED146708	ED152912	*ED170423		

2. Purge
- Attach search.
- Show total postings:________________
- Check one: ✓

☐ Transfer all postings to ________________________.

☐ Transfer postings to ________________________, excluding:
(List accession numbers and show necessary manual reindexing for each.)

☐ Postings are not transferrable.
(Attach 2nd form for invalid/"dead" term entry, or provide manual reindexing for all postings.)

EFF-73 (6/80)

FIGURE VIII-1-8 (Side 2)

ERIC VOCABULARY DEVELOPMENT FORM

☐ Adding New Term.
☐ Modifying Existing Term.
☐ Purging Existing Term.

▨	Action Codes for Modifications Only	
A - ADD	C - CHANGE	D - DELETE

1. TERM_
[ ] 2. GROUP_
[ ] 3. SCOPE_
[ ] 4. UF_
[ ] 5. NT_
[ ] 6. BT_
[ ] 7. RT_

A. INDEXER & CH:

B. SUPERVISORY APPROVAL & DATE:

C. PERSONAL CONTACTS:

CLEARINGHOUSE CONSULTATION
(List CHs contacted, and indicate agreement/disagreement; state reasons for disagreement.)

OTHER PERSONAL CONTACTS AND REACTIONS

D. AUTHORITIES USED:
X = Term Found.
0 = Term Not Found.

E. IMPACT ON THESAURUS

F. IMPACT ON DATABASE
1. NEW TERM - Attach full-text search, including strategy.

List Identifiers to be transferred to new term:

List all accession numbers to which the new term should be posted, excluding those posted by the Identifiers listed above. Precede by an asterisk (*) those accession numbers where the new term should be a major Descriptor.

2. PURGE - Attach search.

Show total postings:

Check one : ✓

☐ Transfer all postings to:

☐ Transfer postings to:
(List accession numbers and show necessary manual reindexing for each.)

☐ Postings are not transferrable.
(Attach 2nd form for invalid/"dead" term entry, or provide reindexing for all postings.)

FIGURE VIII-1-9a: MICROCOMPUTER-PREPARED VOCABULARY DEVELOPMENT FORM (EXAMPLE -- BLANK)

ERIC VOCABULARY DEVELOPMENT FORM

✓ Adding New Term.
☐ Modifying Existing Term.
☐ Purging Existing Term.

[ ]	Action Codes for Modifications Only
A - ADD C - CHANGE D - DELETE	

1. TERM_DRUG USE TESTING
[ ] 2. GROUP_210
[ ] 3. SCOPE_SCREENING FOR DRUG USE OR ABUSE BY THE QUANTITATIVE DETERMINATION OF DRUG METABOLITES IN THE BLOOD, URINE, TISSUE, ETC.
[ ] 4. UF_DRUG TESTING (PRESENCE IN BODY)
[ ] 5. NT_
[ ] 6. BT_EVALUATION METHODS
[ ] 7. RT_DRUG ABUSE;
DRUG USE;
ILLEGAL DRUG USE;
PHYSICAL EXAMINATIONS

A. INDEXER & CH: Jim Houston, AA

B. SUPERVISORY APPROVAL & DATE:

C. PERSONAL CONTACTS:

CLEARINGHOUSE CONSULTATION
(List CHs contacted, and indicate agreement/disagreement; state reasons for disagreement.)

OTHER PERSONAL CONTACTS AND REACTIONS

D. AUTHORITIES USED:
X = Term Found.
O = Term Not Found.

X- MedLine (uses subheadings, e.g., "Substance Abuse -- Diagnosis")
X- PsycInfo (uses "Drug Use Screening" since 1988)
O- Sociological Abstracts
O- Consumer Drug Information File
O- Drug Information Fulltext
X- Health Planning & Administration (follows MedLine)
O- Mental Health Abstracts
X- Nursing & Allied Health CINAHL (follows MedLine)
O- Occupational Safety & Health NIOSH
X- Magazine ASAP (uses "Drug Use Testing" along with subheadings)

All above are DIALOG databases.

FIGURE VIII-1-9b: MICROCOMPUTER-PREPARED VOCABULARY DEVELOPMENT FORM (EXAMPLE -- COMPLETED) Page 1 of 2

E. IMPACT ON THESAURUS

"Drug Use Testing" borrowed from Magazine Index. The common usage "Drug Testing" is ambiguous; UF added to cover that form.

F. IMPACT ON DATABASE

1. NEW TERM - Attach full-text search, including strategy.

List Identifiers to be transferred to new term:

JUL89 Postings -

1	Drug Detection
12	Drug Testing
2	Drug Testing Programs
8	Drug Use Testing
4	Mandatory Drug Testing

List all accession numbers to which the new term should be posted, excluding those posted by the Identifiers listed above. Precede by an asterisk (*) those accession numbers where the new term should be a major Descriptor.

EJ381970
EJ379431
EJ360329
*EJ357608
EJ354960
*EJ352285
*EJ350706
*EJ349449
EJ345800
*EJ341512
*EJ335263
*EJ334596
*EJ330013
*EJ328903
*EJ135318
ED285449
ED282327
ED281304
ED275272

2. PURGE - Attach search.

Show total postings:

Check one : ✓

☐ Transfer all postings to:

☐ Transfer postings to:
(List accession numbers and show necessary manual reindexing for each.)

☐ Postings are not transferrable.
(Attach 2nd form for invalid/"dead" term entry, or provide reindexing for all postings.)

FIGURE VIII-1-9b: MICROCOMPUTER-PREPARED VOCABULARY DEVELOPMENT FORM (EXAMPLE -- COMPLETED) Page 2 of 2

2. Character Limitations

In fields 1 and 4 through 7, allowable characters are limited to the following:

- Upper-case letters A-Z;
- Arabic numerals 0-9;
- Left and right parentheses ( ).

In field 2, use Arabic numerals only (3-digit Group Code).

In field 3, Scope Note/Definition, use any upper-case alphabetics, numerals, and special characters within the standard ERIC character set, except for the semicolon (;). Except in the case of an abbreviation, do not conclude a Scope Note with a period.

3. Field Length

a. Terms

A *Thesaurus* term, whether Descriptor or UF (Used For), may not exceed 50 characters (including spaces) in length. If a term contains more than 50 characters, it is invalid and cannot be accepted by the system.

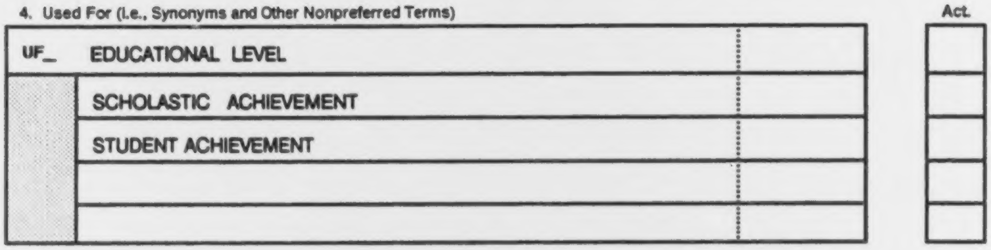
There is no system limitation to the number of Used For terms, Narrower Terms, Broader Terms, and Related Terms that may be entered. However, practical considerations limit the number of lines that can be provided on the pre-printed Vocabulary Development Form. If more space is needed for any of these fields, additional forms should be used and marked SHEET 1 of X, SHEET 2 of X, etc. Also, enter "(CONTINUED)" on the last line of each block that is continued on a following sheet, as in the following example:

FIRST SHEET

4. Used For (i.e., Synonyms and Other Nonpreferred Terms)

			Act.
UF_	ACADEMIC PERFORMANCE (1966 1974)		
	ACADEMIC PROGRESS		
	ACADEMIC SUCCESS		
	EDUCATIONAL ACHIEVEMENT		
	(CONTINUED)		

FOLLOWING SHEET



4. Used For (i.e., Synonyms and Other Nonpreferred Terms)

			Act.
UF_	EDUCATIONAL LEVEL		☐
	SCHOLASTIC ACHIEVEMENT		☐
	STUDENT ACHIEVEMENT		☐
			☐
			☐

In fields 1 and 4 through 7 of the pre-printed Vocabulary Development Form (see **Figure VIII-1-8**), the distance between the underscore following the data-entry keyword and the end of the field block is sufficient to permit the entry of 50 characters and spaces with a PICA (10 characters/inch) typewriter. A vertical mark is provided on each line to mark the 50-character point for ELITE (12 characters/inch) typewriters.

b. **Group Code**

This field is limited to three (3) numeric characters only, i.e., one Descriptor Group Code.

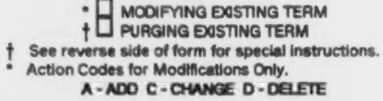
c. **Scope Note**

The Scope Note/Definition field is limited to 370 characters, including spaces. The pre-printed form provides for that number of PICA characters between the end of the underscore following the keyword and the beginning of the shading on the fifth line. For ELITE typewriters, there are 370 spaces between the underscore and the vertical mark on the fifth line.

Because words may not be divided (hyphenated) at the end of lines, it is likely that some additional spaces will be available when the "end" marks are reached. Unused character spaces at the end of lines one through four can be used for continuation beyond the fifth line's end marks. In determining whether there are enough unused positions, remember that the computer system inserts a space after the last word in each line, so that if there are seven character spaces unused on a line, only six are available for carryover use.

4. **Adding New Term**

A "✓" or "X" should be entered in the "ADDING NEW TERM" box at the top of the form's front side, as shown:



† ☒ ADDING NEW TERM
* ☐ MODIFYING EXISTING TERM
† ☐ PURGING EXISTING TERM
† See reverse side of form for special instructions.
* Action Codes for Modifications Only.
A - ADD C - CHANGE D - DELETE

This reminds the indexer (preparer) to check the back of the form for special instructions and alerts the Facility Lexicographer to the purpose of the submittal.

Note: The Action (Act.) boxes accompanying fields 2 through 7 are not used when adding a new term.

a. Main Term (Field #1)

Candidate Descriptors should conform, in both intellectual content and format, to the rules for Main Terms, item D.2 of this section.

A candidate Descriptor is entered in field 1, as follows:

1. Main Term (50 Character Limit)

TERM_ COUNSELORS

b. Group Code (Field #2)

Each candidate Descriptor must be assigned a Group Code by the indexer submitting the form. The Group Code places the new term in one of forty-one (41) broad subject categories called Descriptor Groups. A listing of the Descriptor Groups and Group Codes, and guidelines for selecting the one proper group for a new Descriptor, may be found in the rules for Descriptor Groups, item D.3 of this section.

The selected 3-digit Group Code is entered in field 2, as follows:

2. Group Code	Act.
GROUP_ 240	☐

c. Scope Note/Definition (Field #3)

Most new terms require accompanying Scope Notes. Absence of a Scope Note for a new term must be justified. Most information retrieval thesauri employ Scope Notes to restrict usage of potentially ambiguous terms. Because of the inherent "softness" or imprecision of educational terminology and its overlap across many fields of study, ERIC carries definitional Scope Notes on all terms whose meanings are not self-evident. ERIC's Scope Notes should not be construed as formal definitions, but as indicators of how terms are (or should be) used in indexing. Instructional notations frequently are part of Scope Notes. These notations direct the *Thesaurus* user to other terms, indicate proper coordination, provide historical notes on changes in usage or cross-reference structure, or otherwise guide and explain preferred usage for both indexing and searching.

Scope Notes should be written in accordance with the guidelines and rules of item D.4 of this section, as well as the following:

- Scope notes should be succinct. Keep the length of a Scope Note to the minimum consistent with clarity. Maximum length is 370 characters.

- While the system will accept lower case alphabetic characters, Scope Notes should be entered in all upper case to maintain consistency with existing entries.

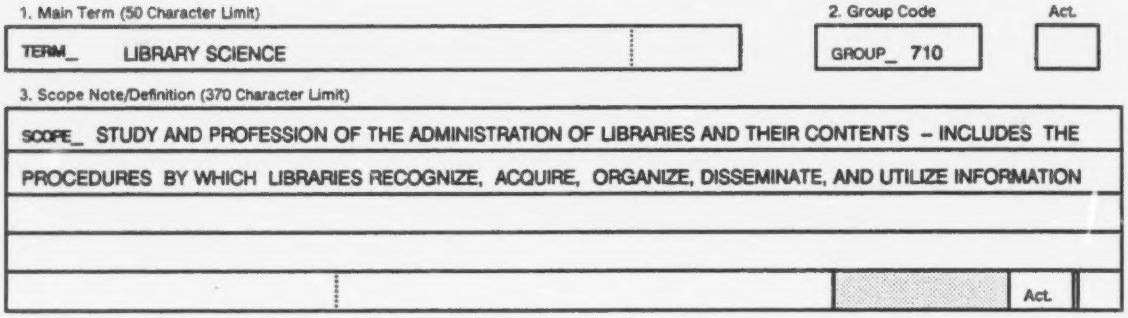
- Be sure to examine the existing Scope Notes of related terms and other terms having the same component words as the candidate Descriptor. Don't "re-invent the wheel" when it is possible to borrow or adapt the work done by others.

- In preparing Scope Notes for new Descriptors, it is necessary to project the possible future applications of the concept in different contexts---to move beyond the applications found in existing documents and articles to consider the potential development, expansion, or refinement of the concept in future years. Dictionaries and other authorities serve as checks against unnecessary restriction of a Descriptor's scope that might inhibit future applications.

- A minimum of three authorities must be cited for each definitional Scope Note prepared. More are desirable. It is strongly recommended that wherever a number of subject-specialized authorities exist, i.e., those directly relevant to the subject area or topic at hand, as many as possible should be consulted. All authorities consulted should be listed on the back side of the input form (block "D"), whether or not they contributed elements to a Scope Note or helped in its justification or support. The check marks X for "term found" and O for "term not found" (see block "D"), inform the Lexicographer that a particular authority was taken into consideration.

- As an aid to lexicographic analysis, submit copies of all definitions utilized in the wording of a Scope Note when these may not be readily available to the Lexicographer, e.g., pages from journal articles. Mark the appropriate passages. (If a microfiche reader/printer is not available and ERIC documents are cited, submit the ED number and the page or frame number.)

The Scope Note is entered in field 3, as follows:



1. Main Term (50 Character Limit)
TERM_ LIBRARY SCIENCE

2. Group Code
GROUP_ 710

Act.

3. Scope Note/Definition (370 Character Limit)
SCOPE_ STUDY AND PROFESSION OF THE ADMINISTRATION OF LIBRARIES AND THEIR CONTENTS – INCLUDES THE
PROCEDURES BY WHICH LIBRARIES RECOGNIZE, ACQUIRE, ORGANIZE, DISSEMINATE, AND UTILIZE INFORMATION

Act.

1. Main Term (50 Character Limit)	2. Group Code	Act.
TERM_ OUT OF SCHOOL YOUTH	GROUP_ 510	

3. Scope Note/Definition (370 Character Limit)

SCOPE_ CHILDREN OF COMPULSORY SCHOOL AGE WHO HAVE BEEN EXCUSED FROM ATTENDING SCHOOL, OR
ADOLESCENTS OVER 16 YEARS OF AGE WHO ARE OUT OF SCHOOL LEGALLY (NOTE: COORDINATE WITH AN
APPROPRIATE AGE OR EDUCATIONAL LEVEL DESCRIPTOR)

Act.

1. Main Term (50 Character Limit)	2. Group Code	Act.
TERM_ SECOND LANGUAGES	GROUP_ 450	

3. Scope Note/Definition (370 Character Limit)

SCOPE_ ANY LANGUAGES OTHER THAN ONE'S NATIVE OR MOTHER TONGUE, USUALLY LEARNED BY FORMAL
INSTRUCTION (NOTE: PRIOR TO MAR80, THE INSTRUCTION "FOREIGN LANGUAGES, USE LANGUAGES" WAS CARRIED
IN THE THESAURUS)

Act.

1. Main Term (50 Character Limit)	2. Group Code	Act.
TERM_ WIND (METEOROLOGY)	GROUP_ 490	

3. Scope Note/Definition (370 Character Limit)

SCOPE_ THE NATURAL MOTION OF AIR (NOTE: DO NOT CONFUSE WITH "AIR FLOW")

Act.

d. Cross-References (Fields #4 - #7)

Necessary cross-references must accompany all new term recommendations. The Vocabulary Development Form carries these cross-references in the same order that they are found in the *Thesaurus*, thereby minimizing confusion both in structuring and evaluating a recommended display. ERIC uses the standard cross-references found in most contemporary information retrieval thesauri---compatible with those recommended by the American National Standard *Guidelines for the Construction, Format, and Maintenance of Monolingual Thesauri*

(ANSI/NISO Z39.19-199X).* These cross-references include the following:

(1) Used For (UF) Terms

See rules for UF (Used For)/USE References, item D.5.

A UF reference is a synonym or variant form of the main term and is not used in indexing. Its mandatory reciprocal is the USE reference. UFs are entered in field 4, as in this example:

1. Main Term (50 Character Limit)

TERM_	COMPUTER SOFTWARE DEVELOPMENT	

4. Used For (i.e., Synonyms and Other Nonpreferred Terms)

			Act.
UF_	COMPUTER SOFTWARE DESIGN		
	COMPUTER SOFTWARE ENGINEERING		
	COMPUTER SOFTWARE MAINTENANCE		
	COURSEWARE DEVELOPMENT #		
	SOFTWARE DEVELOPMENT (COMPUTERS)		

The fourth entry in this example is followed by a pound sign (#), indicating a multiple UF and signifying that two or more main terms must be coordinated in order to index or retrieve that concept. Multiple UFs must be entered under each main term to be used in the coordination. In the above instance, a second Vocabulary Development Form is required, as follows:

1. Main Term (50 Character Limit)

TERM_	COURSEWARE	

4. Used For (i.e., Synonyms and Other Nonpreferred Terms)

			Act.
UF_	COURSEWARE DEVELOPMENT #		

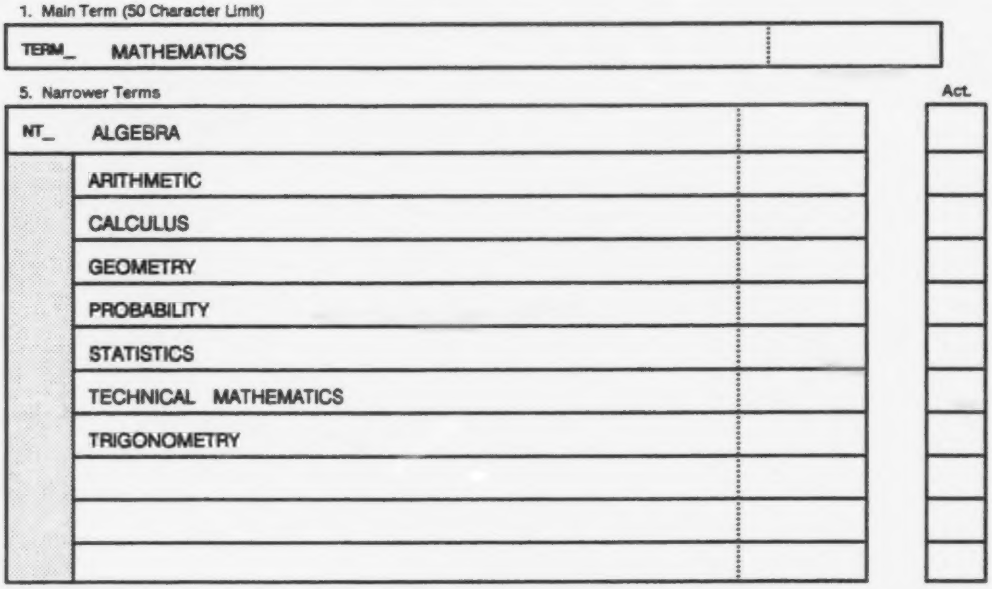
---

*Proposed 1990 revision of ANSI Z39.19-1980. Developed by the National Information Standards Organization (NISO); circulated 1/10/90 among NISO voting members for comment.

(2) Narrower Terms (NT)

See rules for Narrower Terms (and Broader Terms), item D.6.

The NT represents an indexable subclass of the concept represented by the main term; the indexable NT achieves ERIC's goal of "subject-specific" indexing. Its mandatory reciprocal is the "Broader Term." NTs are entered in field 5, as in the following example:



1. Main Term (50 Character Limit)

TERM_ MATHEMATICS

5. Narrower Terms

		Act.
NT_	ALGEBRA	
	ARITHMETIC	
	CALCULUS	
	GEOMETRY	
	PROBABILITY	
	STATISTICS	
	TECHNICAL MATHEMATICS	
	TRIGONOMETRY	

NTs are entered only at the next lower level of hierarchy. Terms such as ADDITION (NT to ARITHMETIC) and SOLID GEOMETRY (NT to GEOMETRY) are NOT entered in the case above.

Particular care must be taken, when inserting a new term into the midst of an existing hierarchical string, to remove existing generic references and thereby avoid incorrect double entries. See item E.5.e.(3) for an explanation of how to deal with this problem.

(3) Broader Terms (BT)

See rules for Broader Terms (and Narrower Terms), item D.6.

The BT represents the broad conceptual class into which a main term is placed. Each Broader Term is an indexable concept and the mandatory reciprocal of an NT. BTs are entered in field 6, as follows:

1. Main Term (50 Character Limit)

TERM_	PHYSICIANS	

6. Broader Terms

			Act.
BT_	HEALTH PERSONNEL		☐
	PROFESSIONAL PERSONNEL		☐
			☐

BTs are entered only at the next higher level of hierarchy. PERSONNEL, the BT to both HEALTH PERSONNEL and PROFESSIONAL PERSONNEL, is NOT entered in the above example. To do so would create the "invalid hierarchy" seen below. Illustrated also is the correct hierarchy in which PHYSICIANS appears twice; this is legitimate since there is no direct hierarchical relationship between HEALTH PERSONNEL and PROFESSIONAL PERSONNEL.

INVALID HIERARCHY	CORRECT HIERARCHY
PERSONNEL	**PERSONNEL**
.Health Personnel	.Health Personnel
..Physicians	..Physicians
.Physicians	.Professional Personnel
.Professional Personnel	..Physicians
..Physicians	

(4) **Related Terms (RT)**

See rules for Related Terms, item D.7.

The RT is an indexable concept that is closely associated with a main term, but is neither equivalent (UF/USE) nor hierarchical (NT/BT). Part-whole relationships, near-synonyms, and other conceptually related terms, of obvious benefit to indexers and searchers, appear as RTs. RTs are reciprocally related in the *Thesaurus*. They are entered in field 7, as shown below:

1. Main Term (50 Character Limit)

TERM_	AGENDA SETTING	

7. Related Terms

			Act.
RT_	AUDIENCE ANALYSIS		☐
	AUDIENCE RESPONSE		☐
	BIAS		☐
	COMMUNICATION (THOUGHT TRANSFER)		☐

	FREEDOM OF INFORMATION		
	INFORMATION DISSEMINATION		
	INFORMATION SOURCES		
	MASS MEDIA		
	MASS MEDIA EFFECTS		
	MASS MEDIA ROLE		
	NEWS MEDIA		
	NEWS REPORTING		
	PERSUASIVE DISCOURSE		
	POLICY FORMATION		
	POLITICAL INFLUENCES		
	PRESS OPINION		
	PUBLIC OPINION		

Only relatively close relationships need be cross-referenced as RTs, and unnecessary proliferation should be avoided. See the guidelines in item D.7 on avoiding RT proliferation.

e. **Special Note on Cross-Reference Reciprocals**

It is not necessary for the preparer of a Vocabulary Development Form to generate cross-reference reciprocals, as this is done automatically by the ERIC *Thesaurus* software. Examples of this capability follow:

ENTERED VIA FORM	GENERATED VIA COMPUTER
MANAGEMENT GAMES UF BUSINESS GAMES	BUSINESS GAMES USE MANAGEMENT GAMES
INTERACTION NT GROUP DYNAMICS	GROUP DYNAMICS BT INTERACTION
SPEECH BT LANGUAGE ARTS	LANGUAGE ARTS NT SPEECH
NEIGHBORHOODS RT SUBURBS	SUBURBS RT NEIGHBORHOODS

Of the examples in the right column, only the USE reference cannot also be entered via the Vocabulary Development Form. (USE references can only be generated reciprocally via the entry of a UF.) Even if a computer-generated NT, BT, or RT is also input inadvertently with a form, the *Thesaurus* software prevents invalid double entry of a term in a single field.

However, the software does not detect invalid cross-referencing of the same term in different fields (i.e., the same term could be filed both as an NT and BT, NT and RT, or BT and RT). In fact, a term can be cross-referenced with itself. Obviously, care must be taken to avoid these illogical relationships.

The software also prevents an existing UF from being filed as a main term, and vice versa; therefore, the above problem of double filing across fields does not extend to the UFs.

5. Modifying Existing Term

After a Descriptor has been entered into the *Thesaurus* file, it may be necessary to correct errors or omissions in its cross-references or to reflect subsequent changes in its application. Modifications to an existing term's Group Code, Scope Note, and/or cross-references may be made by entering a "✓" or "X" in the "MODIFYING EXISTING TERM" box at the top of the Vocabulary Development Form's front side, as shown:

† ☐ ADDING NEW TERM
* ☒ MODIFYING EXISTING TERM
† ☐ PURGING EXISTING TERM
† See reverse side of form for special instructions.
* Action Codes for Modifications Only.
A - ADD C - CHANGE D - DELETE

This reminds the indexer (preparer) to use the Action Codes A, C, and D for recommending specific changes and alerts the Facility Lexicographer to the purpose of the submittal.

For all *Thesaurus* modifications, the preparer should indicate the main term and ONLY those elements of the term's display that he/she wishes to change. Elements not being changed should NOT be shown.

a. Action Codes

Action Codes are provided for the convenience of the preparer, permitting all add, change, and delete modifications recommended for a single Descriptor to be recorded on one Vocabulary Development Form. (In actuality, the *Thesaurus* system requires separate transactions for the add, change, and delete commands, and combinations of these must be separated and sequenced by the Lexicographer, as appropriate, before implementation.)

The Action (Act.) boxes on the form are used to record Action Codes. Use of each of the three (3) codes is described below.

(1) Add

The code for adding an element to a term's display is the letter A. This indicates that the coded item is to be entered in an empty field, or, if there are already entries in the field, that the coded item is to be added to these. The A code is most frequently used in the cross-reference fields (fields 4 through 7). It should be used in recommending a Scope Note (field 3) only when that field is not currently occupied. It cannot be used for a Group Code (field 2), since that field is never empty and accommodates a single code only.

(2) **Delete**

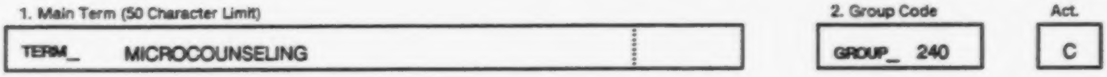
The code for deleting an element from a term's display is the letter D. This indicates that the coded item is to be deleted from the field it occupies. The D code is most useful for recommending the deletion of a specific cross-reference (fields 4 through 7). It can also be used to recommend the elimination of an existing Scope Note (field 3), when it has been determined that the Scope Note is unnecessary. It cannot be used for a Group Code (field 2).

(3) **Change**

The code for changing an entire existing field is the letter C. This indicates that ALL data existing in a particular field is to be removed and replaced with the new data provided on the Vocabulary Development Form. The C code is used most often to change a Group Code (field 2) or a Scope Note (field 3). However, it may also be used to recommend complete changes in cross-reference fields (fields 4 through 7), i.e., when the recommended changes are so extensive that it is easier to enter the result desired than to treat each entry separately. When using the C code, it is important to remember that ALL information that is to appear in the field must be included on the input form.

b. **Group Code Changes**

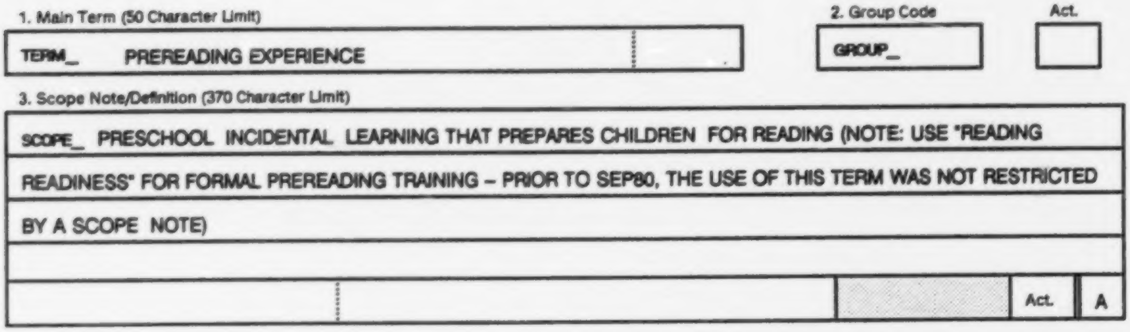
Recommended Group Code changes are entered using the C code. (A and D codes are never used for Group Code changes.) Example:



1. Main Term (50 Character Limit)	2. Group Code	Act.
TERM_ MICROCOUNSELING	GROUP_ 240	C

c. **Scope Note Changes**

The A code is used to recommend a Scope Note when one did not previously exist. Example:



1. Main Term (50 Character Limit)

TERM_ PREREADING EXPERIENCE

2. Group Code

GROUP_

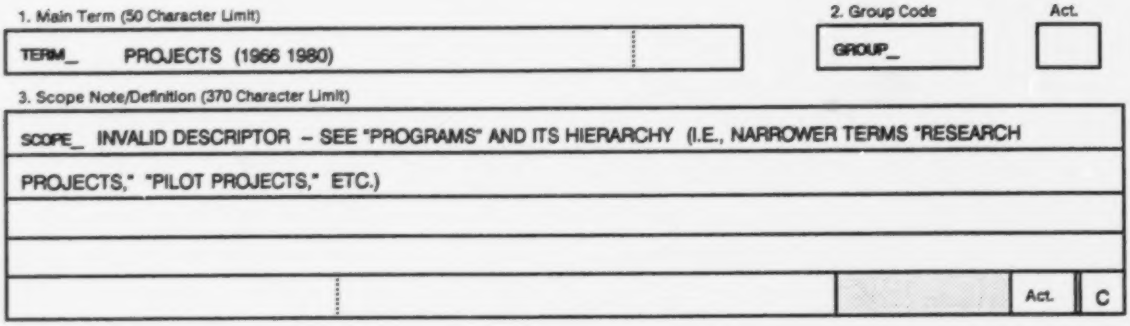
Act.

3. Scope Note/Definition (370 Character Limit)

SCOPE_ PRESCHOOL INCIDENTAL LEARNING THAT PREPARES CHILDREN FOR READING (NOTE: USE "READING READINESS" FOR FORMAL PREREADING TRAINING -- PRIOR TO SEP80, THE USE OF THIS TERM WAS NOT RESTRICTED BY A SCOPE NOTE)

Act. A

The C code is used to recommend the replacement of an existing Scope Note with a new Scope Note (provided on the form). Example:



1. Main Term (50 Character Limit)

TERM_ PROJECTS (1966 1980)

2. Group Code

GROUP_

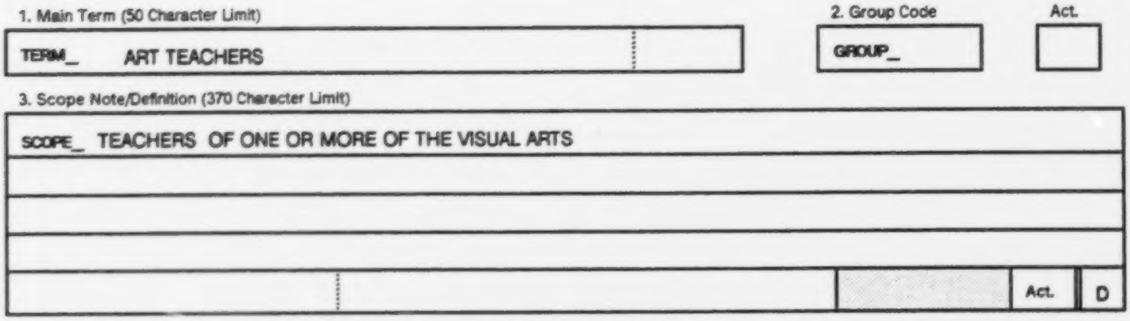
Act.

3. Scope Note/Definition (370 Character Limit)

SCOPE_ INVALID DESCRIPTOR -- SEE "PROGRAMS" AND ITS HIERARCHY (I.E., NARROWER TERMS "RESEARCH PROJECTS," "PILOT PROJECTS," ETC.)

Act. C

The D Code recommends that the Scope Note on the form be expunged from the file. Example:



1. Main Term (50 Character Limit)

TERM_ ART TEACHERS

2. Group Code

GROUP_

Act.

3. Scope Note/Definition (370 Character Limit)

SCOPE_ TEACHERS OF ONE OR MORE OF THE VISUAL ARTS

Act. D

d. **Used For (UF) Changes**

Nonpostable "synonyms," i.e., USE references, may not be entered directly. The addition of a USE reference must be accomplished by submitting a form on the main term to which it will be cross-referenced. If, for example, it is desired to provide the entry MIDLIFE, USE MIDDLE AGED ADULTS, a form would be submitted as follows:

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1. Main Term (50 Character Limit)

TERM_	MIDDLE AGED ADULTS	

4. Used For (i.e., Synonyms and Other Nonpreferred Terms)

			Act.
UF_	MIDLIFE		A

The deletion of a USE reference is accomplished as follows:

1. Main Term (50 Character Limit)

TERM_	AUTO MECHANICS	

4. Used For (i.e., Synonyms and Other Nonpreferred Terms)

			Act.
UF_	SMALL ENGINE MECHANICS		D

If a USE reference is to be made a main term, a separate form deleting the USE reference must accompany the form for the new Descriptor. Also, the new Descriptor should be identified in its Scope Note as a former USE reference (see item C.1.e.(4)).

In adding or deleting "multiple UFs," a separate Vocabulary Development Form must be prepared for each Descriptor used (or to be used) in the coordination. Additionally, each entry of a multiple UF on the forms must be followed by the pound sign (#).

e. Hierarchical (NT/BT) Changes

Extreme care should be exercised in making changes to Narrower and Broader Terms to ensure that hierarchical validity is maintained. The following examples will illustrate some of the problems that can occur and how they can be solved.

(1) Broader Term (BT) Changes

Assume that the term MEDICAL ASSISTANTS has the two BTs HEALTH PERSONNEL and PARAPROFESSIONAL PERSONNEL. Upon examination, it is determined that ALLIED HEALTH PERSONNEL would be the more appropriate BT, allowing the existing BTs to be deleted since both appear in the ALLIED HEALTH PERSONNEL display. The required changes would be entered as follows:

1. Main Term (50 Character Limit)

TERM_	MEDICAL ASSISTANTS

6. Broader Terms

		Act.
BT_	ALLIED HEALTH PERSONNEL	A
	HEALTH PERSONNEL	D
	PARAPROFESSIONAL PERSONNEL	D

Note that HEALTH PERSONNEL, BT to ALLIED HEALTH PERSONNEL, must be deleted to prevent an invalid double appearance of MEDICAL ASSISTANTS in the hierarchy. In the example, the same end result could have been accomplished as follows:

1. Main Term (50 Character Limit)

TERM_	MEDICAL ASSISTANTS

6. Broader Terms

		Act.
BT_	ALLIED HEALTH PERSONNEL	C

Since the Change transaction first clears the field and then replaces it with the new information, it is not necessary to enter specific Deletes for HEALTH PERSONNEL and PARAPROFESSIONAL PERSONNEL.

(2) Narrower Term (NT) Changes

Assume that examination of the NTs for STUDENTS shows that STUDENT VOLUNTEERS has been omitted from the list, and that STUDENT TEACHERS erroneously carries both COLLEGE STUDENTS and STUDENTS as BTs. The required changes would be entered as follows:

1. Main Term (50 Character Limit)

TERM_	STUDENTS

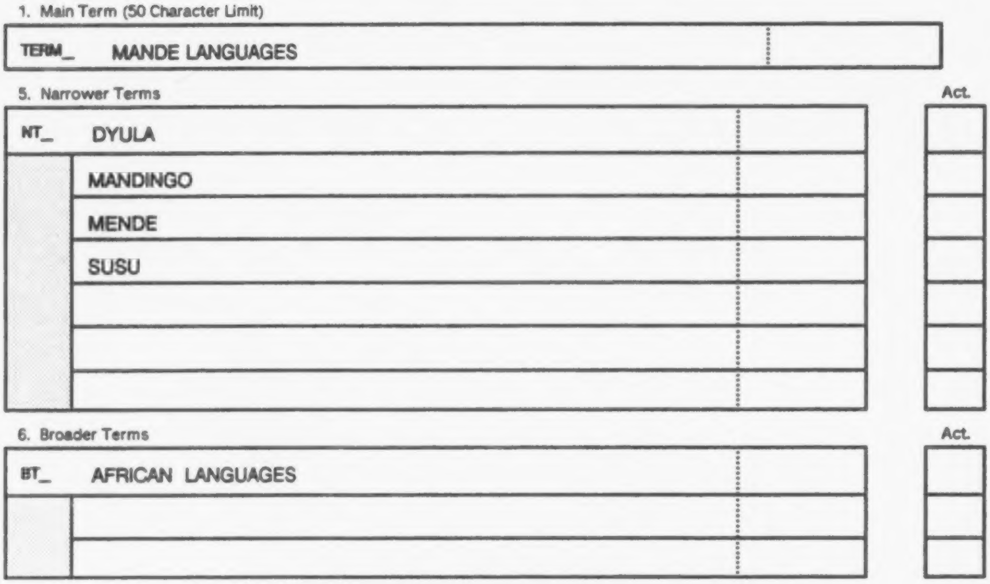
5. Narrower Terms

		Act.
NT_	STUDENT TEACHERS	D
	STUDENT VOLUNTEERS	A

In this case, the Change transaction would not be used because of the large number of terms in this field that are being retained (i.e., not being changed). The result could, of course, have been accomplished by Broader Term changes to STUDENT TEACHERS and STUDENT VOLUNTEERS, but this would have required two input forms. Without additional modifications taking place, the above approach would be preferred.

(3) Hierarchical Insertions

When a new term is inserted in the middle of an existing hierarchical string, it is usually necessary to prepare a second Vocabulary Development Form in order to prevent invalid double entries in the hierarchy. For example, assume it becomes desirable to collect several of the NTs to AFRICAN LANGUAGES under a new Descriptor MANDE LANGUAGES. The NT/BT structure of the new term might be as follows:



1. Main Term (50 Character Limit)

TERM_ MANDE LANGUAGES

5. Narrower Terms — Act.

		Act.
NT_	DYULA	
	MANDINGO	
	MENDE	
	SUSU	

6. Broader Terms — Act.

		Act.
BT_	AFRICAN LANGUAGES	

If only this addition was made to the *Thesaurus* file, all of the NTs to MANDE LANGUAGES would show both that Descriptor and AFRICAN LANGUAGES as BTs, creating improper double references in the hierarchical display of AFRICAN LANGUAGES. Therefore, a second input form modifying AFRICAN LANGUAGES must accompany the one adding the new term. The modification, in this case, would appear as follows:

1. Main Term (50 Character Limit)

TERM_	AFRICAN LANGUAGES	

5. Narrower Terms

			Act.
NT_	DYULA		D
	MANDINGO		D
	MENDE		D
	SUSU		D

f. **Related Term (RT) Changes**

Recommendations for RT changes can be made by adding and/or deleting terms from the field as necessary.

1. Main Term (50 Character Limit)

TERM_	VICTIMS OF CRIME	

7. Related Terms

			Act.
RT_	DEATH		D
	MALPRACTICE		A
	PATIENTS		D
	REHABILITATION		A
	WAR		D

However, use of the Change transaction is advisable if extensive modifications are recommended:

1. Main Term (50 Character Limit)

TERM_	DESIGN CRAFTS	

7. Related Terms

			Act.
RT_	CERAMICS		C
	CLOTHING DESIGN		
	CRAFT WORKERS		
	DESIGN		
	FURNITURE DESIGN		
	HANDICRAFTS		
	INDUSTRIAL DESIGN		
	SKILLED OCCUPATIONS		

g. "Across-Field" Modifications

Care should be taken to avoid invalid double cross-references when moving terms between fields. Before cross-references are added to a field, each should be checked to assure they are not retained in another field. Across-field modifications can be entered on the same input form, as follows:

1. Main Term (50 Character Limit)

TERM_	INFORMATION DISSEMINATION	

6. Broader Terms

			Act.
BT_	INFORMATION SERVICES		A
	INFORMATION UTILIZATION		D

7. Related Terms

			Act.
RT_	INFORMATION SERVICES		D
	INFORMATION UTILIZATION		A

6. Purging Existing Term

A "purge" is used for recommending the total discontinuance of an indexable term. A "✓" or "X" should be entered in the "PURGING EXISTING TERM" box at

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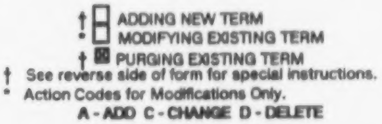
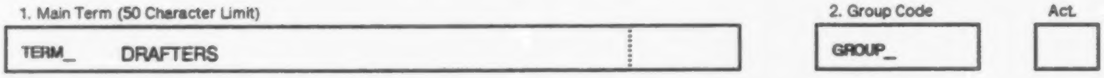
the top of the Vocabulary Development Form's front side:



† ☐ ADDING NEW TERM
* ☐ MODIFYING EXISTING TERM
† ☒ PURGING EXISTING TERM
† See reverse side of form for special instructions.
* Action Codes for Modifications Only.
A - ADD C - CHANGE D - DELETE

This reminds the indexer (preparer) to check the back of the form for special instructions and alerts the Facility Lexicographer to the purpose of the submittal.

After checking the purge box, the term to be purged is entered in Field #1, the "main term" line. Fields 2 through 7 are NOT used when purging a term. Example:



1. Main Term (50 Character Limit)
TERM_ DRAFTERS
2. Group Code
GROUP_
Act.

No other elements need be entered because a "purge" command automatically deletes a term's complete display and all of its reciprocal cross-references from the *Thesaurus* file.

Descriptor purges are based on, and necessitated by, one of two factors:

(1) changes occurring in the literature of the system;

(2) situations of ambiguity, synonymity, and inutility discovered in the vocabulary.

Because purges have an immediate and significant impact on searching, a decision on what to do with a term's existing postings must accompany all purge recommendations. The following alternatives are available, but, before considering them, the indexer should be familiar with the guidelines for Former Main Terms, item D.2.e of this section.

a. Transfer to New Term

This alternative is used for word form corrections, including the replacement of obsolete, incorrect, or unnecessarily specific terminology.

Examples: Transfer postings on CEREBRAL DOMINANCE
to (new term) BRAIN HEMISPHERE FUNCTIONS

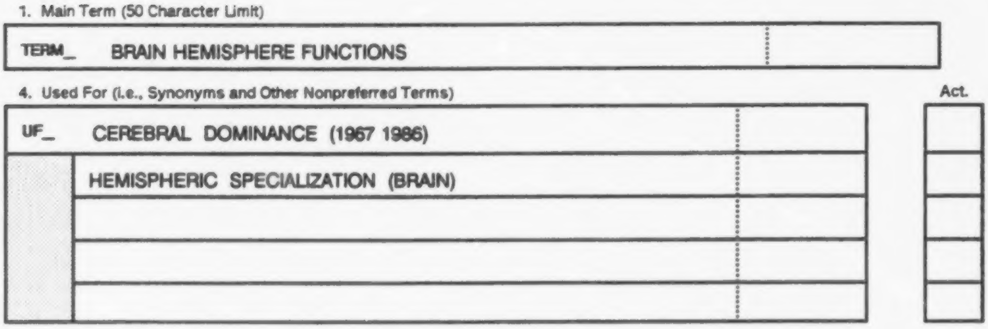
Transfer postings on MANPOWER DEVELOPMENT
to (new term) LABOR FORCE DEVELOPMENT

Transfer postings on NAVAHO
to (new term) NAVAJO

Transfer postings on WATER POLLUTION CONTROL
to (new term) WATER POLLUTION

Each of the above situations involves the creation of a new Descriptor, and two Vocabulary Development Forms are required to complete each transaction. In most cases, the need for purging a Descriptor and transferring its postings to a new word form can be demonstrated in an examination of the titles posted to the concept. Database searches should be conducted to statistically test the validity of such changes. (Relying on one's indexing experience is not enough.) Statistical evidence and available supporting evidence from authorities should be gathered and submitted on the back of, or attached to, the Vocabulary Development Forms. Justification should include comments on the equivalency of the old and new expressions, and on shifts in emphasis and meaning.

Transferred Descriptors must be identified in the *Thesaurus* by parenthetical "life span" notations, e.g., "(1966 1980)." They are entered as UFs to the Descriptors to which they are transferred. Using the first example above, the Vocabulary Development Form for the new term BRAIN HEMISPHERE FUNCTIONS would include the following entries:



1. Main Term (50 Character Limit)

TERM_	BRAIN HEMISPHERE FUNCTIONS	

4. Used For (i.e., Synonyms and Other Nonpreferred Terms)

			Act.
UF_	CEREBRAL DOMINANCE (1967 1986)		
	HEMISPHERIC SPECIALIZATION (BRAIN)		

The UF HEMISPHERIC SPECIALIZATION (BRAIN) is a "carryover" from the former Descriptor CEREBRAL DOMINANCE.

(See also "Transferred Descriptors" discussion under "UF (Used For)/USE References," item D.5 of this section.)

b. Simple Merge

This alternative is used for the merging of synonyms, of near-synonyms (where one is not warranted or where the terms are synonymous for purposes of retrieval), and of very lightly posted terms.

Examples: Transfer postings on TEACHER RATING
to TEACHER EVALUATION

Transfer postings on UNEMPLOYED
to UNEMPLOYMENT

Transfer postings on GIRLS CLUBS
to YOUTH CLUBS

"Simple merge" transactions also require two Vocabulary Development Forms, one to first purge the unwanted term and a second to update the display of the retained term. The form for the retained (receiving) Descriptor should include a "life span" UF for the deleted term (see example of BRAIN HEMISPHERE FUNCTIONS and CEREBRAL DOMINANCE in the previous section), any of the deleted term's UFs that are needed to maintain access, and any other cross-reference or Scope Note modifications that are needed to reflect conceptual changes stemming from the transfer. Copies of subject index pages, printouts of searches, and evidence from authorities should be attached to the input forms to demonstrate the usefulness of such changes. In the justification, the indexer should explain the retention/deletion decision and comment on the following as appropriate:

- statistical effect of the merger on future postings;
- any distinguishing differences in meaning or usage between the terms; and
- possibilities for separate retrieval by computer where differences exist.

(See also discussion on synonymity, "Is It a Synonym?," item C.1.d of this section.)

(SPECIAL NOTE: The mere fact of infrequent use is not an adequate justification for purging a lightly posted term. Unless lightly posted terms can be transferred to other meaningful Descriptors without information loss, it is usually best to leave them alone.)

c. **Multiple Merge**

This alternative is used to eliminate multiple synonyms or to gather several lightly posted NTs under an existing or new BT.

Examples: Transfer postings on FOOD SERVICE INDUSTRY, FOOD SERVICE OCCUPATIONS, and FOOD SERVICE WORKERS to FOOD SERVICE

Transfer postings on GROUPING PROCEDURES, SORTING PROCEDURES, TAXONOMY, and TYPOLOGY to CLASSIFICATION

A separate Vocabulary Development Form is required for each term involved in a multiple merge transaction, whether being purged or retained. As with alternatives "a" and "b" above, "life span" UFs must be included on the forms of the retained Descriptors, as well as necessary "carryover" cross-references and other data from the deleted displays. Justification should include statistical evidence from the postings and definitional/structural evidence from authorities.

d. **Term Split**

This alternative allows the transfer of low-use terms to two (or more) more general terms, when a one-to-one transfer (either to a BT or RT) would result in information loss. The receiving terms can then be coordinated to retain specificity.

Examples: Transfer COMMUNITY SCHOOL DIRECTORS
to ADMINISTRATORS and COMMUNITY SCHOOLS

Transfer AFTER SCHOOL TUTORING
to AFTER SCHOOL EDUCATION and TUTORING

Transfer BOOK THEFTS
to BOOKS and STEALING

Again, a separate Vocabulary Development Form must be prepared for each term involved. However, this type of transaction requires that the UF for the purged Descriptor be entered as a new "multiple UF," as in the following example:

1. Main Term (50 Character Limit)

TERM_	AFTER SCHOOL EDUCATION	

4. Used For (i.e., Synonyms and Other Nonpreferred Terms)

			Act.
UF_	AFTER SCHOOL TUTORING (1966 1980) #		A

1. Main Term (50 Character Limit)

TERM_	TUTORING	

4. Used For (i.e., Synonyms and Other Nonpreferred Terms)

			Act.
UF_	AFTER SCHOOL TUTORING (1966 1980) #		A

(Note that on both input forms, the A action code was used because the receiving terms are existing Descriptors.)

(See discussion on "Multiple UFs" in item D.5.e of this section.)

In justifying "term splits," the preparer should comment on other alternatives for transfer and the reasons for wanting the "multiple UF," the appropriateness of the postings to each of the recipient terms, and the effects of the "multiple UF" on manual retrieval.

e. Postings Split

This alternative is used when an existing term has been employed for different concepts, either because it is a homograph or because of indexing misuse.

Examples: Transfer postings on FRESHMEN
to either COLLEGE FRESHMEN or
HIGH SCHOOL FRESHMEN

Transfer postings on ANIMAL SCIENCE
to either ANIMAL HUSBANDRY or ZOOLOGY

Every "postings split" requires some manual reindexing. Before this can occur, however, the postings for each indexable meaning of a "split" must be isolated. For example, the records posted to FRESHMEN would need to be separated into at least two sets---those pertaining to COLLEGE FRESHMEN and those pertaining to HIGH SCHOOL FRESHMEN. Computer searching is required for isolating these sets; the following search strategies might be employed:

Set #1--COLLEGE FRESHMEN

FRESHMEN and (HIGHER EDUCATION or TWO YEAR COLLEGES or COLLEGE STUDENTS or TWO YEAR COLLEGE STUDENTS)

Set #2--HIGH SCHOOL FRESHMEN

FRESHMEN and (HIGH SCHOOLS or JUNIOR HIGH SCHOOLS or HIGH SCHOOL STUDENTS or JUNIOR HIGH SCHOOL STUDENTS or GRADE 9)

The possibility of some records that pertain to multiple subsets of meaning (in this example, to both Set #1 and Set #2) should not be overlooked, i.e.:

Set #3--Both COLLEGE FRESHMEN and HIGH SCHOOL FRESHMEN

(Set #1 Results) and (Set #2 Results)

Since the precision of search "hits" is dependent on the search strategy employed, as well as the original indexing, it is always best to "eyeball" the individual records in each set to ensure their accuracy. Once this check and necessary adjustments are made, the preparer of the Vocabulary Development Form can list his/her recommendations for manual reindexing. This may be done on the back of the form (under the check box that reads "transfer postings to______, excluding:______") or on the copy of the search submitted with the form.

Assume that the three searches on FRESHMEN produced the following numbers of hits: 100 in Set #1, 40 in Set #2, and 10 in Set #3. Sets #2 and #3 have fewer hits and are, therefore, the logical choices in this example for manual reindexing. Thus, FRESHMEN needs to be deleted from, and HIGH SCHOOL FRESHMEN added to, each record in Sets #2 and #3. Other indexing errors and inconsistencies in these records could, of course, be recommended as well. Four sets of transactions are normally required for manual reindexing: Delete EDs, Delete EJs, Add EDs, and Add EJs. An example for each set is given below:

DELETE_EDxxxxxx
DESC_Freshmen

DELETE_EJxxxxxx
DESC_Freshmen; High School Students

ADD_EDxxxxxx
DESC_High School Freshmen

ADD_EJxxxxxx
DESC_*High School Freshmen; High Schools
IDEN_Florida; *As You Like It

Delete transactions need not show whether a term is major or minor, i.e., preceded or not preceded by an asterisk (*); all asterisks are ignored by the Delete transaction process. Add transactions, on the other hand, must include the asterisk if the Descriptor (or Identifier) is to be a major term in the reindexed record. In the above examples, HIGH SCHOOL FRESHMEN will be a minor Descriptor in the ED (RIE) record and a major Descriptor in the EJ (CIJE) record. Terms other than FRESHMEN and HIGH SCHOOL FRESHMEN in these examples represent typical additional reindexing recommendations desired by the reviewer (preparer of the Vocabulary Development Form).

All recommended manual reindexing is reviewed by the Facility lexicographic staff and, when approved, is keyed, proofed, and released to the ERIC master files. Continuing with the example of FRESHMEN, once manual reindexing for the 50 hits of Sets #2 and #3 is accomplished, the remaining 100 hits in Set #1 can be updated using ERIC's "Transfer-and-Delete" program. This program requires only one transaction to remove FRESHMEN from the 100 remaining records and to add COLLEGE FRESHMEN to each, while retaining major/minor designators intact.

All manual reindexing recommendations for postings splits should accompany the Vocabulary Development Forms submitted for the terms to be purged. Additional forms are required to retain the transferred Descriptors as USE references. Terms whose postings are split should be entered as USE references in one of two ways:

- A "split" homograph is entered as a UF under all of the other Descriptors that were used to break down its postings and multiple meanings. Split homographs carry parenthetical life span notations as other transferred Descriptors do. Additionally, however, each must carry a second qualifier that will limit its meaning to the particular context of the main term or Descriptor under which it is entered. The following examples show the ultimate disposition of the split homograph FRESHMEN:

Indexer-Generated UFs (entered on Vocabulary Development Forms)	Computer-Generated Reciprocals
COLLEGE FRESHMEN UF FRESHMEN (1967 1980) (FIRST YEAR COLLEGE STUDENTS)	FRESHMEN (1967 1980) (FIRST YEAR COLLEGE STUDENTS) USE COLLEGE FRESHMEN
HIGH SCHOOL FRESHMEN UF FRESHMEN (1967 1980) (GRADE 9)	FRESHMEN (1967 1980) (GRADE 9) USE HIGH SCHOOL FRESHMEN

Definitional qualifiers for split homographs always follow the life span notations. This structure is used because such qualifiers were not part of the original Descriptors. (Qualifiers that were part of original Descriptors precede the life span notations.)

- Purged terms whose postings are split because of misuse in indexing should normally be carried as single or multiple UFs under those Descriptors that best reflect how the purged terms should have been used (had they been used correctly). The purged Descriptor ANIMAL SCIENCE is an example of this situation.

  ANIMAL SCIENCE is a branch of agriculture concerned with "the breeding and husbandry of agricultural animals, and the production, processing, and distribution of agricultural animal products" (Classification of Instructional Programs, National Center for Education Statistics, 1991). It had been structured in the AGRICULTURE hierarchy of the ERIC *Thesaurus* and should have been used exclusively in that sense. Its usage by indexers for the biological science of ZOOLOGY is not supported by lexicographic authorities nor by the educational literature. ANIMAL SCIENCE, therefore, cannot be considered as a "split" homograph, although its former postings were split between ANIMAL HUSBANDRY and ZOOLOGY. Only one USE reference presently appears in the *Thesaurus* to indicate the existence of this former Descriptor, i.e.:

ANIMAL HUSBANDRY UF ANIMAL SCIENCE (1967 1980)	ANIMAL SCIENCE (1967 1980) USE ANIMAL HUSBANDRY

  This single USE reference may not tell the whole story of this former Descriptor's usage, but additional *Thesaurus* entries for the term are not justified by either authorities or the literature.

f. "Dead" or Invalid Term Option

This option is used for purging unwanted Descriptors that, because of inconsistent usage over time, are not readily transferrable. "Dead term" status puts a hold on former Descriptors, preventing their further use in indexing and allowing them to be set aside for examination and possible reindexing at a later date.

A minimum input of two Vocabulary Development Forms is required. One form is used for the purge transaction (see back of form for check box that reads "postings are not transferrable"). The term is then reentered on the second form as an invalid/"dead" Descriptor, e.g.:

† ☒ ADDING NEW TERM
* ☐ MODIFYING EXISTING TERM
† ☐ PURGING EXISTING TERM

1. Main Term (50 Character Limit)	2. Group Code	Act.
TERM_ READING LEVEL (1966 1980)	GROUP_ 460	

3. Scope Note/Definition (370 Character Limit)

SCOPE_ INVALID DESCRIPTOR – USED FOR BOTH THE READING LEVEL OF PEOPLE AND THE READABILITY LEVEL OF
MATERIALS – SEE "READING ACHIEVEMENT" AND "READABILITY" RESPECTIVELY FOR THESE CONCEPTS

Act.

Since their postings have not been transferred, invalid Descriptors are reentered as main terms rather than as UFs. Like transferred Descriptors, invalid Descriptors carry life span notations, which indicate the period of time these terms were used in indexing, make their "dead" status easily identifiable in all *Thesaurus* displays, and effectively prevent their further use in indexing. Also, like other main terms, invalid Descriptors are assigned to one of the Descriptor Groups and carry Scope Notes intended to lead indexers and searchers to more precise or meaningful terminology. Unlike other main terms, however, invalid Descriptors carry none of the standard *Thesaurus* cross-references (i e., no UFs, NTs, BTs, nor RTs). (See item E.4, parts a, b, and c of this section for additional information.)

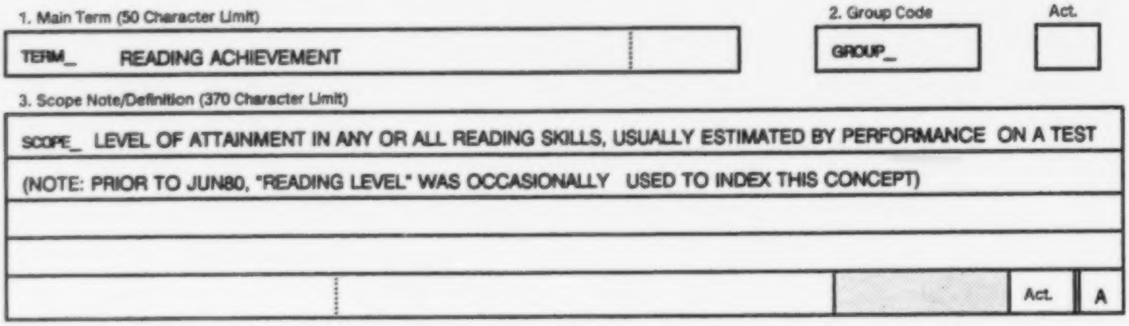
Although invalid Descriptors carry no standard cross-references, retrieval considerations sometime necessitate a reference to an invalid Descriptor in a preferred term's Scope Note. In the case of READING LEVEL, two additional Vocabulary Development Forms were prepared and submitted for this purpose, as follows:

1. Main Term (50 Character Limit)	2. Group Code	Act.
TERM_ READABILITY	GROUP_	

3. Scope Note/Definition (370 Character Limit)

SCOPE_ THE QUALITY OF READING MATTER THAT MAKES IT INTERESTING AND UNDERSTANDABLE TO THOSE FOR
WHOM IT IS WRITTEN (NOTE: PRIOR TO JUN80, "READING DIFFICULTY" AND "READING LEVEL" WERE OCCASIONALLY
USED TO INDEX THIS CONCEPT)

Act. C



1. Main Term (50 Character Limit)

TERM_ READING ACHIEVEMENT

2. Group Code

GROUP_

Act.

3. Scope Note/Definition (370 Character Limit)

SCOPE_ LEVEL OF ATTAINMENT IN ANY OR ALL READING SKILLS, USUALLY ESTIMATED BY PERFORMANCE ON A TEST

(NOTE: PRIOR TO JUN80, "READING LEVEL" WAS OCCASIONALLY USED TO INDEX THIS CONCEPT)

Act. A

Both READABILITY and READING ACHIEVEMENT were in the *Thesaurus* at the time READING LEVEL was made invalid; thus, the above entries were handled as "change" transactions (with a check in the box that reads "modifying existing term"). Notice the action codes "C" and "A" where "C" indicates a replacement Scope Note, while "A" is used to add a Scope Note where none existed previously. Also, notice the reference to READING DIFFICULTY in the READABILITY Scope Note; during the same *Thesaurus* update, both READING DIFFICULTY and READING LEVEL were made invalid because of inconsistent usage.

(See also discussions on "Invalid 'Dead' Descriptors" under "Main Terms" in item D.2 and "Ambiguous Usage" under "Scope Notes" in item D.4 of this section.)

g. Transfer to Identifier Field

This alternative permits those Descriptors that hindsight shows are more suitable as Identifiers to be reposted to the Identifier Field. There are several situations where this action is appropriate, i.e.:

- Highly specific proper nouns.

  Example: Move postings of CHAUTAUQUAS to Identifier Field

- Coined terminology.

  Example: Move postings of NUCLEATION (LANGUAGE LEARNING) to the Identifier Field

- Synonym of a "true" Identifier.
  (Note: A true Identifier is a subject concept used in indexing that does not qualify as a Descriptor---see item C.1.b of this section.)

  Example: Transfer the Descriptor SOUTHERN STATES to the Identifier UNITED STATES (SOUTH).

Only one Vocabulary Development Form is needed for Descriptor-to-Identifier transfers. The form should reflect the purge transaction, accompanied by specific transfer instructions and justification information that explains why the term is not a suitable Descriptor.

Descriptors transferred to Identifier synonyms are added as UFs to the *Identifier Authority List* (IAL) by the Facility lexicographic staff. Scope Notes reflecting such transfers may be added to the IAL, particularly if the former Descriptor was heavily posted.

Descriptor-to-Identifier transfers are extremely rare, comprising fewer than 10 instances in ERIC's first 25 years. Another purge alternative is almost always more suitable.

h. Simple Delete

A final alternative for purging a Descriptor is to expunge all references to it from the *Thesaurus* and all of its postings from the database. Like Descriptor-to-Identifier transfers, "simple deletes" are generally not recommended and should be restricted to the following instances:

- Little-used ambiguous terms that encompass no appreciable subject content.

Examples: ADVANCED SYSTEMS; LIMITED EXPERIENCE; NONFARM YOUTH.

- Little-used highly specific terms whose existence cannot be justified because there is little or no data in ERIC on the subjects they represent.

Examples: BIRACIAL GOVERNMENT; CABINET TYPE PROJECTORS; HORIZONTAL TEXTS.

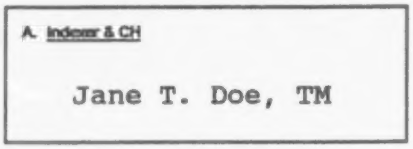
Only one Vocabulary Development Form is required for a "simple delete." However, a search must be attached that shows that each individual posting of the term was checked for alternate retrievability. Other Descriptors should be recommended for all records that need compensatory reindexing.

7. "Justification Information" Section

This section of the Vocabulary Development Form lists the requirements for justifying all *Thesaurus* transactions (whether new term, change, or purge). As an aid to the preparer, specific instructions accompany some of the information blocks. There are six information blocks, labeled A-F.

a. Indexer & CH

Preparer's name and organizational affiliation are entered. For Clearinghouses, enter indexer's name and Clearinghouse prefix.

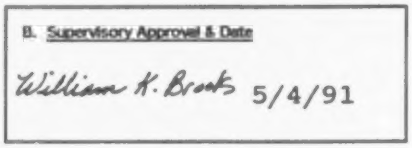


A. Indexer & CH

Jane T. Doe, TM

b. Supervisory Approval & Date

Preparer's supervisor signs and dates the form. For Clearinghouses, the form must be examined by and have the signature of the Clearinghouse Vocabulary Coordinator (or his/her designated representative).



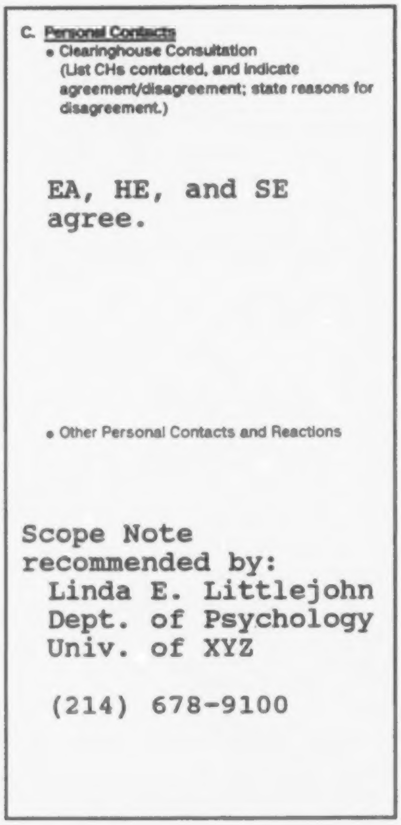
B. Supervisory Approval & Date

William K. Brooks 5/4/91

c. Personal Contacts

This block is subdivided into "Clearinghouse Consultation" and "Other Personal Contacts." Education encompasses wide-ranging subject fields, and ERIC serves a highly diversified user community. Adequate consultation on *Thesaurus* transactions among ERIC's subject-specialty Clearinghouses is necessary in order to avoid parochial points of view. Any transactions on a particular term must be considered from the viewpoints of all those Clearinghouses that may frequently use the term or whose scope areas cover the subject conveyed by the term. Subject specialists, within or outside a particular Clearinghouse, are often contacted with reference to *Thesaurus* transactions. The form reminds the preparer to list such contacts and give their reactions.

The form should list individuals contacted at Clearinghouses, if other than designated Vocabulary Coordinators. Addresses and phone numbers of consultants outside of the Clearinghouses should be provided for lexicographic followup when necessary.



C. Personal Contacts
- Clearinghouse Consultation
  (List CHs contacted, and indicate agreement/disagreement; state reasons for disagreement.)

EA, HE, and SE agree.

- Other Personal Contacts and Reactions

Scope Note
recommended by:
Linda E. Littlejohn
Dept. of Psychology
Univ. of XYZ

(214) 678-9100

d. Authorities Used

Authorities must always be cited for new Descriptors, or for redefining or merging existing Descriptors. Preparers should list all dictionaries, glossaries, and ERIC documents used in preparing Scope Notes, as well as the thesauri used to structure a term's display. The ERIC Facility maintains a "*Thesaurus* Bibliography" of frequently cited terminological references (see item B.6, "Lexicographic Authorities"). A minimum of three authorities must be cited for each definitional Scope Note prepared (see item E.4.c, "Scope Note/Definition (Field #3)").

Each Clearinghouse should copy its regularly used, core authorities on its copies of the form to avoid rekeying the same citations every time a form is completed. Citations, particularly of well-known authorities, may be abbreviated, and each should include the edition or year of publication. In listing core authorities on the form, Clearinghouses should leave enough space so that sources used less frequently, and special sources such as specific ERIC documents and journal articles, can be written or keyed in as needed.

Each authority examined for a specific transaction should be marked "X" or "O" ("Term Found" or "Term Not Found"). In this way, the Lexicographer at the Facility can avoid unnecessary rechecking of authorities that the preparer of the form has already checked. Copies of pertinent sections of journal articles and other special sources cited should be submitted with the form, as these may not be readily available to the Lexicographer; appropriate passages on these copies should be marked or highlighted. (See also item E.4.c.)

D. Authorities Used
(Citations of regularly used authorities may be copied onto the form.) Each authority used should be marked as: X = Term Found; O = Term Not Found.

O	Random House Unabridged, 2nd ed	O	LC Subject Headings, 14th ed
X	A Women's Thesaurus, 1987	O	European Education (EUDISED) Thesaurus, 1984
X	British Education Thesaurus, 1988	☐	CINAHL Subject Heading List, 1992
X	PsychAbs Thesaurus, 1991	O	PAIS Subject Headings, 1990
O	SocAbs Thesaurus, 1989	O	AgeLine Thesaurus, 1991
O	CRS Thesaurus, 1990	O	American Educators' Encyc, 1982
O	Natl Criminal Justice Thesaurus, 1990	X	Educator's Desk Reference, 1989
☐	NASA Thesaurus, 1988	X	Encyc of Educational Research, 7th ed, 1982
☐	MeSH, 1991	X	ED328397 – "Assessing Student Attitudes toward Heterogeneous Grouping: A Pilot Study"
O	SPINES Thesaurus, 1988	X	ED263492 – "Effects of Inter-Class Ability Grouping on Achievement and Self-Esteem"
☐	NCES, Class. of Instructional Progs., 1991	☐	

e. **Impact on *Thesaurus***

This information block asks the preparer to consider the basic pitfalls of a typical vocabulary transaction. These include homographs, overlapping concepts, and invalid hierarchical insertions. Thoughtful consideration of the factors listed on the form should help avoid indexing misuse and searching problems.

E. **Impact on Thesaurus**
Indicate potential impact of this transaction on hierarchies and other terms in the Thesaurus. Consider, particularly, any overlap with other terms. Homographs should be qualified; occasionally, additional forms, revising older scope notes and displays, will need to be submitted in order to avoid indexing misuse.

Candidate Descriptor is specific, unambiguous, and needed to index a concept appearing frequently in the contemporary literature of vocational education.

See attached search.

f. Impact on Database

The last "justification information" block covers the basic procedures that are necessary to assure compatibility at all times between the *Thesaurus* and the ERIC database. This compatibility is a stated ERIC policy (see item B.5, "Synchronization of Lexicography and Indexing") and represents a practice that is not often seen among other major database systems.

Where practicable, a comprehensive update of the database backfile is made whenever a *Thesaurus* term is either added or deleted. These updates lessen the complexities of computer searching, enhance retrieval, and promote user satisfaction with search results. Essentially, each preparer of a Vocabulary Development Form, usually a Clearinghouse indexer, is asked to do a computer search before finalizing his/her recommendation. The perspective of the searcher is an ingredient in all successful indexing, and the practice of researching *Thesaurus* transactions on the computer undoubtedly results in better indexing.

This practice, of course, requires that indexers have ready access to a computer with a modem. Users who are interested in recommending a *Thesaurus* change but without ready access to the ERIC database are requested to contact the Facility Lexicographer for assistance.

The following illustration shows the results of a typical comprehensive search for a new term recommendation. The new term in this case is MAGNET SCHOOLS. Seven (7) functions were performed in order to obtain these results:

1. Find word "magnet" in the Identifier Field.

2. Eliminate (manually) Identifiers retrieved that do not fit the Scope Note of MAGNET SCHOOLS (e.g., any pertaining to metallic attraction).

3. Repeat step #1 full-text (e.g., for titles and abstracts).

4. "Not out" step #1 results from step #3 results.

5. Repeat step #2 on results of step #4.

6. Evaluate the records remaining after step #5 to determine whether MAGNET SCHOOLS should be major or minor.

7. List results of step #2 (second bullet below) and step #6 (third bullet below).

F. Impact on Database

1. New Term

SEARCH ATTACHED

- Attach full-text search, including strategy. Do not limit the search (i.e., by Clearinghouse, by RIE or CIJE, etc.).
- List Identifiers to be transferred to new term. Include all variations. It is unnecessary to also list accession numbers to which the Identifiers are posted.

Magnet Schools
Magnet Centers
Magnet Programs
Magnet Program
Russell Conwell Middle Magnet School
Magnet School Plan
Conwell Middle Magnet School

- List all accession numbers to which the new term should be posted, excluding those posted by the Identifiers listed above. Precede by an asterisk (*) those accession numbers where the new term should be a major Descriptor.

ED016718
ED019341
ED041056
*ED064125
ED064434
ED078621
ED094014
ED116307
*ED117206
ED117226
ED130450
ED137433
ED145054
ED145058
*ED146313
ED146708
ED148969
*ED149454
ED152905
ED152912
*ED156915
ED166314
ED169172
*ED170423
ED178646
*ED181931
*EJ203973
*EJ207708
*EJ210203

The second part of this information block is used for delineating purge recommendations. There are eight alternatives for dealing with the postings of purged Descriptors, each of which is explained under item E.6, "Purging Existing Term." A choice among these alternatives will determine which among the form's three check boxes is appropriate. The example below shows a one-to-one transfer between two existing terms. As the example illustrates, liberal use of the form may be made for explanations and other notes.

2. Purge

SEARCH ATTACHED -- DRAFTERS

- Attach search.
- Show total postings: 28 .
- Check one: ✓

☒ Transfer all postings to: DRAFTING (has 216 postings, overlapping with DRAFTERS 12 times -- total after merge will be 232)

☐ Transfer postings to __________, excluding:
(List accession numbers and show necessary manual reindexing for each.)

☐ Postings are not transferrable.
(Attach 2nd form for invalid/"dead" term entry, or provide manual reindexing for all postings.)

8. **Transmittal of Form**

All completed Vocabulary Development Forms (with attachments) should be transmitted as they occur to the address at the bottom of the form's front side, i.e.:

Send form to:
ERIC Processing and Reference Facility
ATTN: Lexicographer
1301 Piccard Drive, Suite 300
Rockville, MD 20850-4305

Be sure to include search strategies and backfile change recommendations. Backfile changes may be recorded on the Vocabulary Development Forms themselves or, if that is not convenient, on search printouts. *Note: Unscrutinized or unedited ERIC printouts normally need not be sent, since the data they would contain is usually readily available both online and via CD-ROM to all ERIC staff. When sizable search results must be submitted, it is usually easier and more economical to use floppy disks (either 3½-inch or 5¼-inch disks are acceptable).*

To avoid confusion and delays, do not include Vocabulary Development Forms with RIE or CIJE shipments to the ERIC Facility.

Originators, whether Clearinghouses or external users, should retain copies of all Vocabulary Development Forms and related attachments for reference in case coordination is necessary.

9. **ERIC Facility Processing**

Upon receipt of a Vocabulary Development Form, the Facility Lexicographer performs a preliminary review to ensure compliance with the *ERIC Processing Manual*. If there is a significant problem, the originator of the input is contacted prior to entering the recommendation in the *Vocabulary Status Report* (VSR). The VSR is prepared every 1-6 months, but at least twice per year; it is a listing of all *Thesaurus* recommendations and serves as the medium for Vocabulary Review Group (VRG) evaluation and feedback. VSR recommendations approved by the VRG are entered in the *Thesaurus* and the ERIC database by the Facility lexicographic staff; the staff also prepares a periodic summation entitled *Thesaurus Changes and Statistical Data*, which serves as a *Thesaurus* supplement. All of these procedures are fully discussed in item "B.3" of this section, "Vocabulary Development Program."

ATTACHMENT #1

History of the Thesaurus of ERIC Descriptors*

The Western Reserve (WR) Studies

The ERIC feasibility studies funded by the Office of Education (OE) and conducted in the early 1960s by Western Reserve University led in June 1966 to a list of 4,500 terms in the subject area of educational media, structured in an array of broad facets such as activities, characteristics, and people, subdivided by subfacets, and further by numerous groups. The WR team of Gordon Barhydt, Charles Schmidt, & Kee Chang felt strongly that "...the establishment of useful and valid interterm relationships could be accomplished only by the conceptual analysis that is a prerequisite to faceting." This philosophy was supported by earlier classification works such as the American Petroleum Institute's Subject Headings, and The London Education Classification by D.J. Foskett, as well as early advocates such as Maurice Tauber and Oliver Lilley. The Barhydt & Schmidt faceted array thesaurus was published in 1968 by Case Western University Press under the title *Information Retrieval Thesaurus of Education Terms*.

Operation Fingertip and the "Disadvantaged Collection"

Another functional, but less elaborate, approach to thesaurus construction was being pursued in the mid-1960s by the Engineers Joint Council (EJC), the Department of Defense, and a COSATI indexing subpanel. This collaboration, under the rubric Project LEX, led in 1967 to the landmark *TEST Thesaurus*. ERIC followed the activities of Project LEX closely, and in this connection, contracted in 1964 a project called Operation Fingertip with Jonker Business Machines, Inc. Jonker, under Operation Fingertip, developed a "free indexing" core of 2,300 terms while indexing 1,700 ESEA Title I reports. The Central ERIC staff, under the direction of its chief lexicographer James Eller, then structured these terms, using a set of preliminary guidelines based on EJC conventions. The terms were then reviewed by a volunteer group of librarians, information specialists, and educators, and an interim or "Phase I" Thesaurus was made available in June 1966. The so-called "disadvantaged collection" became the first set of documents in the ERIC database. (See ED-070485, *Catalog of Selected Documents on the Disadvantaged: Subject Index.*)

Choosing the "Disadvantaged" Terms over the Western Reserve Facets

Central ERIC decided in mid-1966 to abandon Western Reserve's faceted array of terms and to go with the structured terms of the "disadvantaged collection." Why? The facets were thought to be somewhat inflexible. The new ERIC Facility contractor, North American Aviation, had used the EJC conventions to develop its own Thesaurus, and the resultant software was incompatible with faceted arrays. Also, the WR Thesaurus, originally developed around a collection of documents in the educational media field, was incompatible with the terms and documents on the "disadvantaged" that comprised the initial ERIC database. Thus, a precedent was being set for what still remains true for the ERIC *Thesaurus*. That is, the ERIC *Thesaurus* is an "authority list" and not really a theoretically comprehensive "thesaurus", i.e., only those terms are accepted for the *Thesaurus* that are actually used to index documents in the ERIC database.

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*Some of this information was borrowed from "The Vocabulary," Chapter VII of Delmer J. Trester's *ERIC – the First Fifteen Years; A History of the Educational Resources Information Center* (ED-195289).

Choosing the structured "disadvantaged" terms over the WR facets turned out to be the correct path. The American National Standards Institute's Z39 guidelines for thesaurus structure, construction, and use, published in 1974 (revised & updated in 1980 & 1990[**]) and now the standard for information retrieval thesauri in the U.S., was developed primarily from the earlier precedents established by the *TEST Thesaurus* and the ERIC *Thesaurus*.

The Panel on Educational Terminology

Concurrently with the indexing of the "Disadvantaged Collection," a thesaurus advisory group was formed to consult with Central ERIC. This small 6-person group, called the Panel on Educational Terminology (PET), consisted of both educators and information experts from both inside and outside the Federal Government. Early meetings also involved observers from various subject-matter areas. The PET group, under the direction of ERIC Lexicographer James Eller, guided the development of the ERIC *Thesaurus* through its first 8 years (1965-72).

"Rules for *Thesaurus* Preparation"

Concurrently with the structuring of the "disadvantaged" terms, the PET group began preparing a formal set of rules or conventions to govern vocabulary expansion beyond the initial core of terms. PET had decided that the rules and conventions appropriate for the physical sciences and engineering (developed by the Engineers Joint Council and the Department of Defense's Project LEX) were not entirely suitable for the social sciences and for the field of education. As a result, a modified set of rules regarded as appropriate for ERIC began to take shape. First published in October 1966, these rules were entitled "Rules for *Thesaurus* Preparation."

The rules contained instructions on proper Descriptor construction, format, and content. Special emphasis was placed on the convention that Descriptors must represent concepts found in the literature and must be actually used in the ERIC database. Earlier work at Central ERIC had indicated that the expression of educational concepts is frequently not possible by the use of uniterms (single-word terms). The rules indicated that multiword Descriptors should be used when false coordinations are otherwise probable, when single words combined in searching mean something different than intended, and when single-word terms have excessively high postings. The rules were completed in time for use with the initial indexing for the first issue of RIE, published in November 1966. CIJE appeared about 2 years later, in January 1969.

The 1966 "Rules for *Thesaurus* Preparation" represent the foundation of the ERIC vocabulary rules followed today (see Section VIII (Part 1), item D). A second (and last) edition of these rules was published in September 1969 (see ED-033740).

Vocabulary Expansion (Period of Significant Growth)

The emphasis during the early years was on expanding the ERIC vocabulary beyond the initial core list of terms. New Descriptors were added on the basis of their need in indexing the documents going into the system. When an ERIC indexer determined the need for a new Descriptor, he/she would prepare the appropriate justification with authority citations and definitions, and submit such justification to the Facility Lexicographer. (These same basic practices are in effect today.)

The increase of new Descriptors was rapid during the early years of the ERIC system. A plateau was reached in 1971 with about 7,300 terms, including 4,900 postable main terms. The ensuing 8 years through 1979 brought an average of about 100 new terms per year to the *Thesaurus*. Not until 1980 and the implementation of the results of the comprehensive Vocabulary Improvement Project (VIP) was this trend substantially altered.

[**] 1990 draft revision, ANSI/NISO Z39.19-199x, developed by the National Information Standards Organization (NISO), circulated 1/10/90 among NISO voting members for comment.

Thoughts of Backtracking

As the *Thesaurus* continued to grow, it gradually became apparent that some early decisions were not wholly satisfactory. Problems such as nearly synonymous Descriptors, ambiguity among terms, and discrepancies among generic (hierarchical) relationships began to surface.

The first talk of possibly merging nearly synonymous Descriptors occurred in 1969, but the idea was rejected for the time-being because of the great expense thought to be involved.

By the time DIALOG was commercially operational for online computer searching in early 1972, the PET group had decided it was time to shift attention away from *Thesaurus* expansion to an evaluation of the existing *Thesaurus* terminology from the users' point of view. Before any activity could get underway, however, the PET group disbanded, primarily because its chairperson and ERIC's original Lexicographer, Dr. James Eller, left the ERIC system.

Vocabulary Improvement Program

Before the end of 1972, the ERIC Facility submitted a proposal for the establishment of a nationwide Vocabulary Improvement Program. The program got underway in the fall of 1973 with the development of the "Transfer-and-Delete" software system, and the establishment of the Vocabulary Review Group and the *Thesaurus* Advisory Panel.

The new "Transfer-and-Delete" system allowed one transaction to be written that would both delete a term and simultaneously transfer all of its postings to another term. Such a capability permitted the master files for RIE and CIJE to remain compatible with a substantially modified *Thesaurus*. Vocabulary Review Group members were selected so as to achieve a broad base of coordination. Representatives or "vocabulary coordinators" were included from the ERIC Clearinghouses, as well as from various university libraries and State Education Departments having access to the ERIC database and experience in its use. Recommended changes to the *Thesaurus* were accepted from all network staff and external users. Such recommendations were recorded on a Term Change Notice (TCN) Form and distributed to the review group members for their reactions. The *Thesaurus* Advisory Panel (TAP) was set up as a locally (Washington) based group, consisting of membership from Central ERIC, the ERIC Facility, and several other members within and outside the ERIC network. The group's purpose was to replace the disbanded, policy-making PET group and to resolve those relatively few issues of *Thesaurus* change for which a consensus of review group members could not be achieved.

Never designed as a centralized, intensive clean-up effort, the original Vocabulary Improvement Program was effective in meeting its objectives. During the 1973-78 time frame, 50 TCNs were evaluated by the review group, resulting in the deletion and reposting of 87 unwanted Descriptors. In its meetings, the TAP approved several innovations (e.g., two-way hierarchical display, add/entry dates, multiple "Use" references) that ultimately became integral parts of the *Thesaurus*. However, the program was somewhat cumbersome with its complicated paperwork flow and documentation requirements. In April 1976, an ERIC indexing seminar (held in Annapolis, Maryland, as part of that year's National Technical Meeting) helped to solidify the feeling that it would take far too long to accomplish a thorough thesaural clean-up with the existing program. Following up in November 1976, Central ERIC funded a small study project for Jim Houston, the Facility Lexicographer, to investigate ways in which comprehensive vocabulary improvement might be accomplished in a reasonable time frame.

Shifting into a Higher Gear

Three information systems known to have engaged in vocabulary revitalization efforts (NTIS, the Engineering Index, and the Chemical Abstracts Service) were surveyed by the Facility with the hope that their experience would prove useful in planning a new vocabulary effort for ERIC. In fact, however, ERIC proved to be breaking new ground in planning and accomplishing its vocabulary improvement. The survey report concluded that the best people to turn to for real vocabulary revitalization would be the actual users of the ERIC *Thesaurus*, i.e., the indexers in the ERIC Clearinghouses and the searchers within ERIC's community of users. A plan was presented to Central ERIC on how to elicit this participation.

Utilizing this basic groundwork, Central ERIC selected a "Coordinator" to organize a new, more intensive project in which a thorough *Thesaurus* clean-up could be realized in a relatively short period of time. The newly proposed effort was called the Vocabulary Improvement Project or the VIP. Its first Coordinator was Barbara Booth of the ERIC Clearinghouse for Junior Colleges. Central ERIC selected Lynn Barnett, ERIC Clearinghouse on Higher Education, to coordinate the project when Ms. Booth left the ERIC system in mid-1979.

Vocabulary Improvement Project (VIP)

The new VIP was inaugurated in September 1977 with a national meeting of Clearinghouse vocabulary coordinators and selected users involved in the original Vocabulary Review Group. At that meeting, an Executive Committee was selected consisting of the VIP Coordinator, the Central ERIC Monitor, the Facility Lexicographer, and two vocabulary coordinators from the Clearinghouses. This overall coordination meeting was followed quickly by three more vocabulary coordinators' meetings, held in conjunction with regional technical meetings, where the actual procedures of the new project were worked out.

- **Phase I: "*Thesaurus* Review"**

  The first phase of the project was labeled "*Thesaurus* Review." The goal was to permit as many individuals as possible to critically evaluate each *Thesaurus* Descriptor and its accompanying display. A "Descriptor Review Form" was developed by the VIP Executive Committee, and Clearinghouses participated in preparing a form for each Descriptor and its display -- about 5,200 originals. (See **Figure VIII-1-ATT-1-1** for an example of this form complete with a reviewer's comments.) Each Clearinghouse received a complete set of forms from the Facility in March 1978. Sixteen user organizations also received some of the forms (or all of them, in some cases). By August, over 60,000 Descriptor evaluations had been completed, about 10,000 by the external users.

  All forms were returned to the Facility where they were collated into a complete set for each Descriptor. The Executive Committee then sorted the forms again for Clearinghouse assignment (based on "scope of interest"), and the Facility arranged their distribution. Each Clearinghouse and the Facility received approximately 300 Descriptor assignments. Clearinghouses then determined priorities and arranged their schedules in order to complete their assignments. The axiom "usage determines meaning" was the overriding guideline for Phase II.

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DESCRIPTOR REVIEW FORM

ERIC VOCABULARY IMPROVEMENT PROJECT

ERIC PROCESSING & REFERENCE FACILITY
Clearinghouse/Organization

Reviewer

5-1-78
Date

POSTINGS/USAGES

Total	Major	Minor	RIE	CIJE	1966-1970	1971-1974	1975
942	463	479	171	771	126	558	258

DESCRIPTOR DISPLAY BEING REVIEWED
Group 510

```
LABORATORY PROCEDURES                          JUL66
 SN   TEACHING PROCEDURES USED IN THE
      LABORATORY PHASE OF INSTRUCTION
 BT   TEACHING PROCEDURES
 RT   DEMONSTRATIONS (EDUCATIONAL)
      INQUIRY TRAINING
      INSTRUCTION

      LABORATORY TECHNIQUES
      SCIENCE ACTIVITIES
      SCIENCE EXPERIMENTS
      SCIENCE PROJECTS
      SMALL GROUP INSTRUCTION
```

Experiential Learning
Simulation
Laboratories
(and other "laboratory" terms as appropriate)

RATINGS (Main Term and Scope Note)

	1 High	2	3 Moderate	4	5 Low	6 Don't Know
Interest in term			X			
Usefulness		X				
Clarity of Meaning	Precise		X		Ambiguous	
Acceptability of form	Preferred	X			Nonpreferred	
Distinctness	Discrete			X	Synonymous	

OVERALL ASSESSMENT/DECISION

Main Term
___ OK As Is
X Action Required
___ No Opinion

Display
___ OK As Is
X Action Required
___ No Opinion

CLEARINGHOUSE USE ONLY
___ In-Scope
___ Out of Scope

Specific changes (suggested by action items checked below) may be indicated directly on the display to the left, when appropriate.

ACTION REQUIRED—MAIN TERM/SCOPE NOTE/GROUP CODE (Optional)

X Add/revise Scope Note See comment below
___ Change Group Code to
___ Homograph, divide and/or qualify
X Retain, but merge near-synonym(s) "Laboratory Techniques"
___ Delete, transfer to new term
___ Delete, merge with existing term (SYN) (BT) (RT)
___ Delete, transfer to Identifier field
___ Delete (only)
___ Other (specify below)

ACTION REQUIRED—DISPLAY (Optional)

___ Add/delete/NT(s)
X Add/delete/BT(s) Add "Methods"; Delete "Teaching Procedures"
X Add/delete/RT(s) See Display
___ Add/delete/UF(s)
___ Other (specify below)

ADDITIONAL COMMENTS (e.g., special meanings within sub-disciplines, relationships with other terms). Continue on back if necessary:

Little difference between the ways "lab procedures" & "lab techniques" are used in indexing. Recommend deleting latter term. With a merge, above Scope Note should be changed to something very general or deleted entirely.

Form No. EFF 54 (12/77)

FIGURE VIII-1-ATT-1-1: "DESCRIPTOR REVIEW FORM" OF THE VOCABULARY IMPROVEMENT PROJECT (VIP)

- **Phase II: "Production"**

Phase II or the "Production" phase extended from November 1978 to September 1979, during which time Clearinghouse personnel (using the completed "Descriptor Review Forms") wrote and rewrote scope notes, merged synonymous terms, updated obsolete terminology, and revised cross-references. All suggestions were recorded on a special *Thesaurus* input form (designed by the Executive Committee -- see **Figure VIII-1-ATT-1-2**), sent to and reviewed by the Facility lexicographic staff, then keyed into a special *Thesaurus* file informally called the *"Play Thesaurus"* (PT). Each suggestion in the PT identified the originator by Clearinghouse/Facility prefix and was coded "approved/disapproved" by the Lexicographers. The PT was updated twelve times over a 14-month period. Each issue was distributed to all participants, who could then react to the suggestions of others, or to lexicographic decisions, via a special "Comment" field. Each "Comment" was also identified by Clearinghouse/Facility prefix and arranged chronologically so that a continuing dialog was provided throughout the twelve PT issues. Nearly 11,000 transactions had been entered into the PT file when the last issue was published shortly after New Year's Day 1980. The Executive Committee met during the week of January 14-18, 1980 in Washington, D.C., to close out the PT phase of the VIP. Over 500 terms that had not received final resolution in the PT were reviewed by the Committee, and final dispositions were made.

Nearly 7,000 suggestions from the "production" phase were designated as "approved." These were keyed directly from the PT to the "real" *Thesaurus* file. The working copies of the "new" *Thesaurus* were ready in March 1980 for use in indexing; the published version followed in June 1980. A summary of the major VIP transactions follows:

1,437	Scope Notes Written
512	New Main Terms Added
841	Main Terms Converted to "USE" Terms
123	Terms Invalidated (i.e., kept on the file, but no longer used)
18	Terms Purged
563	New "USE" Terms Added
716	"USE" Terms Deleted

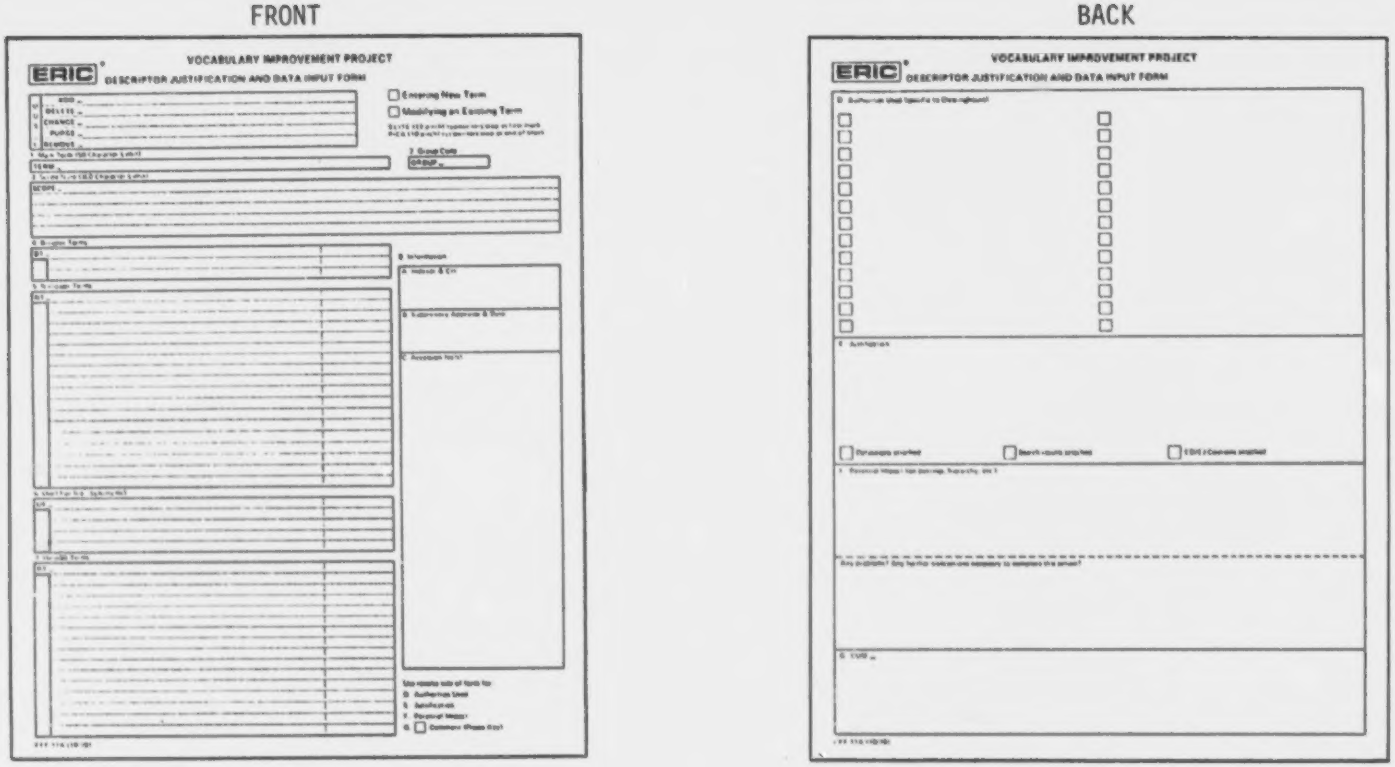
The RIE and CIJE master files and the inverted postings were updated to reflect all of these changes---this involved more than 2 million transactions to individual records in the database. Updated magnetic tapes were sent to the online vendors in September 1980.

- **The VIP Legacy**

The 1977-80 Vocabulary Improvement Project (VIP) was a major event in the history of ERIC and in the information/library science field. Such an undertaking by a major information system was virtually unprecedented. The ERIC *Thesaurus* was completely revised to reflect contemporary indexing needs, while the integrity of the ERIC database was preserved for the searcher through massive updating, and both were done within a period of 3 years.

-- **Total Network Involvement in *Thesaurus* Development**

The VIP introduced a new methodology for thesaurus development and maintenance activities within a decentralized system. Prior to the VIP, changes to the ERIC *Thesaurus* (particularly with respect to individual terms) were based essentially on negotiations solely between a submitting Clearinghouse and the central lexicographic staff. The VIP, through its interactive *"Play Thesaurus,"* extended the negotiation process to all Clearinghouses.



FRONT

ERIC

VOCABULARY IMPROVEMENT PROJECT

DESCRIPTOR JUSTIFICATION AND DATA INPUT FORM

☐ Entering New Term

☐ Modifying an Existing Term

DELETE

CHANGE

PURGE

Group Code

GROUP

TERM

SCOPE

BACK

ERIC

VOCABULARY IMPROVEMENT PROJECT

DESCRIPTOR JUSTIFICATION AND DATA INPUT FORM

FIGURE VIII-1-ATT-1-2: "PLAY THESAURUS" INPUT FORM OF THE VOCABULARY IMPROVEMENT PROJECT (VIP)

In the VIP, decisions negotiated between a submitting Clearinghouse and the Lexicographers were recorded in a "*Play Thesaurus*" (PT) for other Clearinghouses to see. All Clearinghouses could then review these decisions and use the PT for communicating their opinions and other comments. The Lexicographers, conducting additional negotiations as necessary, would then use these remarks in finalizing a term, its Scope Note, and/or display for the "real" *Thesaurus* file.

This system of total participation worked so well that it was retained and continued after the VIP was completed.

"Vocabulary Development Program"

In May 1980, Patricia Coulter (Central ERIC Monitor of the VIP), Lynn Barnett (VIP Coordinator), Jim Houston (Facility Lexicographer), and Carolyn Weller (Identifier Coordinator) met to determine how to use the experience gained during the comprehensive Vocabulary Improvement Project for the future development and control of the ERIC *Thesaurus*. Through their deliberations, a new program was outlined having the overall purposes of increasing efficiency, reducing costs, and more thoroughly involving the Clearinghouses and users in the *Thesaurus* activities of the future. In order to represent a new beginning, the new program was called the "Vocabulary Development Program." With the blessing of Central ERIC, and after a review by Clearinghouse staff members involved in vocabulary work, the new program became operational in December 1980.

The "Vocabulary Development Program" is structured to permit all *Thesaurus* recommendations to be examined by a "Vocabulary Review Group" (VRG) before final dispositions are made. Reconstituted from the earlier VRG (see "Vocabulary Improvement Program"), the present VRG's 29 members include representatives from every Clearinghouse, Central ERIC, ACCESS ERIC, the CIJE Publisher, the Facility, several user organizations, and "International ERIC."[***] The Vocabulary Status Report (VSR), issued at least twice a year, serves as the mechanism for alerting the VRG to proposed changes, for soliciting the membership's comments and recommendations, and for notifying all members of final dispositions.

Lynn Barnett of the ERIC Clearinghouse on Higher Education was the first Chair of the reconstituted Vocabulary Review Group in 1980-81. Anita Colby of the ERIC Clearinghouse for Junior Colleges has served as the VRG Chair from 1982 to the present.

Each ensuing year since 1980 has seen approximately 100 new main terms added to the *Thesaurus* file. The latest 12th (1990) edition of the *Thesaurus* contains approximately 10,000 vocabulary terms, of which approximately 5,600 are main-entry Descriptors and 4,400 are non-indexable Use references and "dead" terms.

Although the new program requires some additional turnaround time to determine dispositions, this appears to be fully justified considering the additional lexicographic perspectives gained across Clearinghouse subject areas and between indexers and users. The functions, work flow, and documentation procedures of the new "Vocabulary Development Program" are discussed in **item B.3** of this section.

[***] "International ERIC" (informally, *InterEd*) includes representatives of the *Australian Education Index*, *British Education Index*, and *Canadian Education Index*, as well as ERIC.

ATTACHMENT #2

Vocabulary Development Form (VDF) Computer Templates

(These two sample computer templates are provided as possible models in addition to the one illustrated in **Figure VIII-1-9** of this section.)

TEMPLATE #1

OCT 31 1988

ERIC VOCABULARY DEVELOPMENT

Adding new term

TERM: **INFORMATION SCIENCE EDUCATION**

GROUP:

SCOPE: POSTSECONDARY EDUCATION OR TRAINING OF INFORMATION SCIENTISTS AND OTHER INFORMATION PROFESSIONALS (NOTE: PRIOR TO MONTH YEAR, THIS CONCEPT WAS SOMETIMES INDEXED UNDER "LIBRARY EDUCATION")

UF:

NT: LIBRARY EDUCATION

BT: POSTSECONDARY EDUCATION
PROFESSIONAL EDUCATION

RT:

Betsy Reifsnyder, IR

Supervisory Approval & Date:

BAm 10/27/88

PERSONAL CONTACTS: None

AUTHORITIES USED

NOTE: X - term(s) considered (as listed in parentheses)
O - relevant terms not found

Education Authorities

O *Dictionary of education*, Good, 1973
X *Education Index*

(INFORMATION SCIENCE--TEACHING)

Library/Information Science Authorities

O *ALA glossary of library and information science*, 1983
O *Hennepin County Library Cumulative Authority List*, July 1988
O *Librarians' glossary of terms used in librarianship*, Harrod, 1984
X *Library Literature*

(INFORMATION SCIENCE--TEACHING; INFORMATION SCIENTISTS--EDUCATION)

X *Library of Congress Subject Headings*, 11th ed. or as updated online

(INFORMATION SCIENCE--STUDY AND TEACHING)

IMPACT ON THESAURUS/EXPLANATION OF PROPOSALS

Accompanying change needed in LIBRARY EDUCATION, which is proposed as a NT of INFORMATION SCIENCE EDUCATION. Although LIBRARY EDUCATION was placed solely under POSTSECONDARY EDUCATION, it is proposed that INFORMATION SCIENCE EDUCATION be placed both under POSTSECONDARY EDUCATION and PROFESSIONAL EDUCATION. NOTE: LIBRARY EDUCATION includes the education of professionals and paraprofessionals. The inclusion of LIBRARY EDUCATION in a PROFESSIONAL EDUCATION hierarchy is based on the precedent set by LEGAL EDUCATION (PROFESSIONS), which is placed under PROFESSIONAL EDUCATION and which includes the education of attorneys and paralegals.

IMPACT ON DATABASE

Full-text search attached.

Identifiers to be transferred to the Descriptor:

INFORMATION SCIENCE EDUCATION

Accession numbers to which the new term should be posted, excluding any posted from Identifiers listed above. Accession numbers where the new term should be a major Descriptor are preceded by an asterisk. Note: Records retrieved by the following search strategy/ies but inappropriate for posting are crossed out.

NOTE: Records already assigned the terms LIBRARY SCHOOLS or LIBRARY EDUCATION are not proposed for posting to the new term.

Title NOT Identifier search strategy:

information (w) science (w) education

~~EJ365047~~
~~EJ343639~~
~~EJ351279~~
~~EJ351186~~
~~EJ340289~~
~~EJ340287~~
~~EJ336261~~
~~EJ327053~~
~~EJ318756~~
~~EJ318686~~
~~EJ317249~~
~~EJ314106~~
~~EJ310388~~
~~EJ286995~~
~~EJ266663~~
~~EJ264721~~
~~EJ225883~~
* EJ214707
* EJ199857
~~EJ162648~~
~~EJ136465~~
* EJ009668
~~ED273274~~
~~ED272201~~
~~ED265865~~
~~ED265864~~
~~ED265863~~
~~ED265862~~
~~ED265861~~
~~ED265860~~
~~ED265859~~
~~ED265858~~
~~ED265857~~
~~ED265856~~
~~ED265855~~
~~ED265854~~
~~ED237088~~
~~ED203863~~
~~ED111425~~
~~ED101738~~
~~ED100312~~
* ED059615

678

Information
Science
Education
4

```
? e information science education

Ref    Items   RT  Index-term
E1      1508   16  INFORMATION   SCIENCE   (STUDY   OF   THE  PROPERTIES  OF
                   INFORMATION, I.E....)
E2         1       INFORMATION SCIENCE ABSTRACTS
E3        51      *INFORMATION SCIENCE EDUCATION
E4         9       INFORMATION SCIENCE RESEARCH
E5       311    6  INFORMATION SCIENTISTS (INDIVIDUALS WHO OBSERVE, MEASURE,
                   AND DESCRI...)
E6         1       INFORMATION SEARCH SERVICES
E7         9       INFORMATION SECTOR
E8         1       INFORMATION SECURITY OVERSIGHT OFFICE
E9      1111   14  INFORMATION SEEKING
E10        2       INFORMATION SELECTION
E11        1       INFORMATION SERVICE EXPEDITER
E12     3001   23  INFORMATION  SERVICES  (THE ACTIVITIES (E.G., INFORMATION
                   SELECTION,...)
```

```
 S32  105381  INFORMATION
 S33   70042  SCIENCE
 S34  425200  EDUCATION  (PROCESS OF IMPARTING OR OBTAINING KNOWLEDGE,...)
 S35     135  INFORMATION (W) SCIENCE (W) EDUCATION
 S36      60  S35/ED
 S37      75  S35/EJ
 S38      49  S35/TI
 S39      57  S35/AB
 S40       0  S35/DE
 S41      53  S35/ID
 S42      39  S35/ID,MAJ
```

```
 S43      14  S35/ID,MIN
 S44      49  S35/TI
 S45      53  S35/ID
 S46      42  S35/TI NOT S35/ID
```

TEMPLATE #2

JUL 31 1989

ERIC VOCABULARY DEVELOPMENT FORM

X Adding New Term

TERM_PAYING FOR COLLEGE

GROUP_620

SCOPE NOTE_DISCUSSION ABOUT OR METHODS FOR FINANCING AN INDIVIDUAL'S COLLEGE EDUCATION -- NOTE: DO NOT CONFUSE WITH "STUDENT COSTS"

UF_

NT_

BT_

RT_EDUCATIONAL FINANCE
STUDENT COSTS
PARENT FINANCIAL CONTRIBUTION
STUDENT FINANCIAL AID
STUDENT LOAN PROGRAMS
FINANCIAL SUPPORT
LOAN REPAYMENT
LOAN DEFAULT (new)

A. **Indexer & CH:** Lynn Barnett/HE

B. **Supervisory Approval & Date:** Lynn Barnett, 7/20/89

C. **Personal Contacts:**

Clearinghouse Consultation -- JC agrees

Other personal contacts/reactions

D. **Authorities Used:**

British Education Thesaurus
Good's Dictionary of Education (3rd)
International Encyclopedia of Higher Education
Medical Subject Headings (1979)
NASA Thesaurus (1985)
Sociological Abstracts
Thesaurus of Psychological Index Terms
UNESCO Thesaurus
A Woman's Thesaurus
X EJ 304 667 - "Paying for College: Plot a Course Now"
X EJ 292 818 - "Paying for College: Beyond Financial Aid"
X ED 260 670 - "How Middle-Income Families Pay for College"
X ED 002 924 - "How People Pay for College"

2

E. Impact on Thesaurus

Indicate potential impact on hierarchies and other terms, particularly overlap with other terms. Qualify homographs.

The descriptor STUDENT COSTS may have been used in the past for the concept represented by PAYING FOR COLLEGE, but STUDENT COSTS implies more. Probably the note in the SN will take care of that. "Paying for college" is really a hot topic in the literature and in the discussions of the student financial aid legislation. We've toyed with other phrases (e.g. COLLEGE COSTS), but they are not specific enough for the concept. Some documents previously indexed with the iden COLLEGE COSTS have been identified below for re-indexing with PAYING FOR COLLEGE.

F. Impact on Database

1. New Term

Attach full-text search, including strategy. Do not limit search by CH, RIE, CIJE, etc.

```
Search shows:
          90  PAYING FOR COLLEGE/ID
         123  COLLEGE COSTS/ID
          21   PAY?(2W)COLLEGE?/TI
          73   PAY?/AB(2W)COLLEGE/AB    [most not relevant]
```

List identifiers to be transferred to new term.

PAYING FOR COLLEGE

List all accession numbers to which the new term should be posted, excluding identifiers. Use * to note majors.

*EJ304667	*EJ172074	*EJ005450	*ED260670	*ED193980
				*ED002924
*EJ292818	*EJ104462	*ED266704		*ED074887
*EJ234481		*ED260673	*ED195182	*ED038124

Also, see attached page for additional accession numbers.

2. Purge

n/a

681

3

Add PAYING FOR COLLEGE
to highlighted underscored* acc. numbers

10/1/1-72
EJ384160 EJ334537 EJ302996 EJ265832
ED266753 ED260672
EJ377717 EJ330100 EJ302995 ED296636
ED266750 ED260671
EJ376206 * EJ325425 EJ302992 ED296633
ED266741 ED260670
EJ344128 EJ323989 EJ299882 ED286395
~~ED266704~~ ED260608
EJ344125 EJ312153 EJ296934 ED283499
ED265783 ED259614
EJ344118 EJ310290 EJ281336 ED272044
ED264807 ED259600
EJ341547 EJ308586 EJ281330 ED272041
ED263843 ED258516
EJ341546 EJ308562 EJ279742 ED271038
ED263835 ED255161
EJ341543 EJ306942 EJ278169 ED267696
ED262713 ED255160
EJ341542 EJ306939 EJ278164 ED267684
ED262712 ED255159
*EJ339085 EJ302998 EJ276658 ED267681
ED262693 ED255158
*EJ336157 EJ302997 EJ271462 ED267676
ED260673 ED254130

10/1/73-121
ED253186 ED249914 ED247810 ED242246
ED231315 ED223165
ED253142 ED249913 ED247804 ED242240
ED231314 ED221146
ED253141 ED249912 ED246820 ED242231
ED231259 ED221116
ED252150 ED249904 ED246762 ED240942
ED230091 ED215655
ED252137 ED249875 ED246758 ED238388
ED230085
ED252129 ED249852 ED246756 ED238308
ED228974
ED252115 ED248815 ED246755 ED235713
ED228944
ED251028 ED248755 ED246703 ED234703
ED228939
ED250985 ED247862 ED243392 ED232586
ED224435

4

F. Impact on Database

1. New Term

Attach full-text search, including strategy. Do not limit search by CH, RIE, CIJE, etc.

n/a

List identifiers to be transferred to new term.

n/a

List all accession numbers to which the new term should be posted, excluding identifiers. Use * to note majors.

n/a

2. Purge

n/a

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Section VIII:
Vocabulary Development and Maintenance (Part 2)—Identifiers

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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SUMMARY OF SIGNIFICANT RULES

1. Identifiers are semi-controlled retrieval terms intended to add a depth to indexing that is not always possible with Descriptors alone. An Identifier is usually the name of a specific entity, e.g., project, person, place, organization, test, group, item of equipment, piece of legislation. An Identifier may also be a new concept, under consideration for Descriptor status and awaiting approval for admission to the ERIC *Thesaurus*.

2. The *Identifier Authority List* (IAL) should be consulted before index terms are added to the Identifier fields of RIE and CIJE. The IAL serves as a companion volume or supplement to the ERIC *Thesaurus*.

3. A term may not be an Identifier if it is an existing Descriptor, a synonym (UF) referenced to a Descriptor, a Dead/Invalid Descriptor, or a variant form of a Descriptor.

4. Because acronyms have a high potential of being homographs, their use alone is to be avoided.

5. Identifiers may not exceed 50 characters in length, including spaces. Terms naturally exceeding 50 characters must be shortened according to prescribed procedures (i.e., by removal of articles, conjunctions, prepositions, etc., or by abbreviating common words). However, the first word of an Identifier may never be an abbreviation although it can be an acronym.

6. Spelling and word form conventions used for Descriptors should also be used for Identifiers. Spelling of proper names should not be changed. American (United States) English standard usage is followed for common nouns.

7. Non-English terms not found in standard unabridged English dictionaries or in specialized subject dictionaries ordinarily should be translated (unless they have no ready English equivalent, e.g., *Intifada*, or unless they are part of a personal or proper name, such as that of an organization, where translation depends on the way the name usually appears in English print).

8. Numbers exceeding one word in length should normally be written as Arabic numerals (except when the spelled out version is the official or formal name). Roman numerals are generally permitted only when used as the numbers of legislative "titles."

9. Identifiers do not have the complex hierarchical structure of Descriptors, but they may, as needed, have UFs (providing cross-references) or Scope Notes (providing explanatory material).

10. Identifiers that are homographs must be differentiated either by a parenthetical qualifier or by a spelling variation. They cannot be differentiated by spacing or case.

11. Identifiers may not contain ANY punctuation other than left and right parentheses.

12. Identifiers are grouped by specific characteristics or subject matter into twenty (20) categories, i.e., personal names, organizations, geographic locations, etc. In addition to the general rules contained in this summary, each category has its own specific conventions or guidelines that should be followed in creating new Identifiers.

VIII. VOCABULARY DEVELOPMENT AND MAINTENANCE (PART 2)—IDENTIFIERS

A. Introduction

Whereas Part 1 of Section VIII discussed the development and maintenance of Descriptors (controlled indexing terms), Part 2 addresses the creation and use of Identifiers (semi-controlled indexing terms). In addition, this Section also describes the procedures used by the ERIC Facility to review incoming Identifiers and to maintain the *Identifier Authority List* (IAL). As with Descriptors, all of the discussion in the Section applies to usage in both *Resources in Education* (RIE) and *Current Index to Journals in Education* (CIJE).

1. Definition and Function

Identifiers are semi-controlled retrieval terms, intended to add a depth to indexing that is not always possible with Descriptors alone. An Identifier is usually the name of a specific entity, e.g., project, piece of legislation, person, place, organization, test, group, item of equipment. There is a nearly infinite number of specific entities, and it is not appropriate to burden a thesaurus with such multiplicity. Also, the specificity of Identifiers makes them often transitory and infrequent, conditions that further justify exclusion from a controlled indexing authority such as the *Thesaurus of ERIC Descriptors.*

An Identifier may also be a new concept, under consideration for Descriptor status once its scope, definition, and "staying power" have been established. Candidate Descriptors, awaiting approval for admission to the *Thesaurus of ERIC Descriptors*, must always be indexed as Identifiers. In fact, reasonable frequency of use as an Identifier is one of the factors in the decision to "graduate" Identifiers to Descriptors.

Identifiers are not structured or typically defined in a formal way as Descriptors are; however, they must be somewhat controlled in order to eliminate the proliferation of variant forms of the same concept. Such control is achieved by imposing format standards, particularly for such entities as geographic locations, organization names, and specific ethnic and occupational groups.

The ERIC Identifiers have been grouped into meaningful categories for the purpose of bringing like terms together. **Figure VIII-2-1** depicts the current set of ERIC Identifier categories, and the number of Identifiers, as well as the percentage of all Identifiers, in each category as of 1992. Categories are useful in subdividing an Identifier file for particular indexing and searching applications. The categories are a quick way for indexers to determine available options among particular types of terms. Omissions and commissions of Identifiers are more easily spotted using a smaller category than in using an alphabetical list of all Identifiers.

2. *Identifier Authority List* (IAL)

The *Identifier Authority List* (IAL) is a total alphabetical list of the preferred Identifier forms, developed according to standards discussed in this Section, that can be used to achieve consistency in indexing and searching alike. In its two printed forms (Alphabetical and Category Displays), it serves as a companion volume or supplement to the ERIC *Thesaurus*. Just as the *Thesaurus* controls Descriptor usage, the IAL provides control over Identifiers to the extent that variant forms of the same concept are eliminated.

CATEGORY NUMBER	CATEGORY NAME	NUMBER OF IDENTIFIERS IN CATEGORY	PERCENT OF IDENTIFIER AUTHORITY FILE
02	CONFERENCES/MEETINGS	356	.8
03	CURRICULUM AREAS	568	1.3
04	EQUIPMENT (INCLUDING COMPUTERS AND SOFTWARE)	1,419	3.2
05	FACILITIES	520	1.2
07	GEOGRAPHIC LOCATIONS	2,513	5.7
08	GROUPS (ETHNIC)	441	1.0
09	GROUPS (OCCUPATIONS)	691	1.6
10	GROUPS (OTHER)	449	1.0
11	HEALTH-RELATED (INCLUDING PSYCHOLOGY)	1,965	4.5
12	HISTORICAL/SPECIAL EVENTS	235	.5
13	LANGUAGES/LINGUISTICS	1,420	3.2
14	LAWS/LEGISLATION	1,308	3.0
15	METHODS/THEORIES	3,907	8.9
16	MISCELLANEOUS	3,180	7.2
17	ORGANIZATIONS/INSTITUTIONS	9,221	21.0
18	PERSONAL NAMES	3,074	7.0
19	PROJECTS/PROGRAMS	4,221	9.6
20	SCIENCE & TECHNOLOGY	2,029	4.6
21	TESTS/TESTING	5,252	11.9
22	TITLES (LITERARY & ARTISTIC)	1,232	2.8
	TOTAL	44,001	100.0

FIGURE VIII-2-1: ERIC IDENTIFIER CATEGORIES (Statistics for 1992)

First published in 1980, the IAL was the result of an Identifier editorial project that reviewed the Identifiers in the ERIC master file from the beginning of ERIC in 1966 through April 1976. The project ultimately reduced the number of Identifiers on the file for that period from approximately 46,000 to 25,000. The cumulation of this large number of Identifiers over ERIC's first 10 years occurred as the system evolved from a manual, print-oriented database to a system accessible via computer in a variety of different ways. As the number of entry points increased and the file expanded, it became necessary to reduce the number of ways single subjects could be accessed.

The approximately 25,000 edited Identifiers, known as "preferred terms," became the basis for the IAL as it now exists. The other 21,000 "non-preferred terms" were either variant Identifier forms transferred to one of the preferred forms, variants (or duplicates) of Descriptors and eventually transferred to the appropriate Descriptor, or unnecessary or ambiguous items that could simply be purged.

Another by-product of the Identifier editorial project was the creation of the detailed guidelines in this Section. The third consequence of the project was the establishment of ERIC Facility review and maintenance procedures described later in this Section.

Since the creation of the IAL in mid-1980, the IAL has increased in size to more than 44,000 Identifiers, as new terms were added as a result of the regular monthly input to the database. Items are purged from the IAL as they are upgraded to Descriptor status and shifted to the ERIC *Thesaurus*.

The printed IAL, including its supplements, should always be consulted before index terms are added to the Identifier fields of RIE and CIJE. The computerized IAL is used as a validation file during the editing of all incoming ERIC resumes.

B. Identifier Editing Procedures

1. RIE

All Identifiers on incoming resumes for RIE are validated by computer against the IAL, and terms in the field not found in the IAL are flagged as "unauthorized." In addition, the computer program checks each term for length (it may not exceed 50 characters) and for the existence of invalid punctuation. All Identifiers flagged as "unauthorized," or exhibiting one of the other conditions, are reviewed by the lexicographic staff.

The staff checks the IAL to determine if a Descriptor or existing Identifier can be substituted for the unauthorized Identifier. If not, then the term is checked to ensure that it meets the guidelines for use as well as format.

Using the guidelines in this Section, as well as those found in Section VII on "Indexing," unauthorized Identifiers are evaluated and accepted as is, reformatted and then approved, or rejected. (Of the unauthorized Identifiers flagged each month, approximately 60% are implemented.) A Category is assigned and requirements for the addition of a Scope Note and/or Synonyms are noted. The Facility editors make any necessary corresponding changes to the RIE input.

Since one of the roles of the Facility is to help ensure uniformity of indexing for the sixteen Clearinghouses' RIE input, the omission or inclusion of existing Identifiers is also reviewed. When appropriate, Identifiers may be added or deleted.

2. CIJE

Identifiers on CIJE input are also validated by the computer and terms not in the IAL flagged. CIJE editors correct invalid Identifiers and reformat incorrect or misspelled Identifiers. The terms are not currently evaluated for inclusion in the IAL nor assigned to a Category.

3. ERIC Facility IAL Maintenance Procedures

After new "unauthorized" Identifiers are approved for use on RIE resumes, the terms are permitted to enter the database. However, at this point, these terms have not yet been implemented to the IAL. At the end of the monthly issue, an Exception Report, showing all of the "unauthorized" terms for that issue, is generated by the computer. The master authority list (IAL) is then updated.

Other additions, changes, or deletions to the IAL are made at the same time as the update. Whenever the ERIC *Thesaurus* is updated with new Descriptors, most of which are "graduates" from the IAL, the corresponding terms, as well as any existing synonyms, are purged from the IAL. Periodically, the Facility also reviews the IAL for highly posted Identifiers. These terms are typically candidates for "graduation." (See **Section VIII-1, Item C.1.b** and **Figure VIII-1-4** for more information about this list.)

4. Clearinghouse Role in IAL Maintenance

Although Clearinghouses are not required to formally submit terms for the IAL as they are with the *Thesaurus*, it is recommended that Clearinghouses maintain an inhouse list of all Identifiers that are potential Descriptors. This list periodically should be reviewed and Vocabulary Development Forms (see **Section VIII-1, Item E**) generated when the volume of postings of these Identifiers warrants such action.

Whenever it is necessary to create a new Identifier for a large series of documents, Clearinghouses are urged to coordinate the term with the Facility lexicographic staff before assigning it to multiple resumes. In addition, Clearinghouses are encouraged to share with other indexers (e.g., via electronic mail) any new concepts in their field and how these should be identified. For example, the Clearinghouse on Urban Education informed the network about the new movement "Accelerated Schools." Since this movement is not the same as the existing Descriptor "Acceleration (Education)," UD requested that indexers encountering this concept use the Identifier "Accelerated Schools." Such coordination helps avoid variant forms in new Identifiers.

C. General Guidelines/Rules Applying to All Identifiers

1. Document/Identifier Relationship—The IAL Takes Precedence

Although a basic principle in cataloging is to follow the document, when it comes to Identifiers, the spelling and form in the IAL take precedence over what is used in the document. Spelling of the names of individuals, form and/or spelling of the names of organizations, projects, tests, etc., are frequently incorrectly used by authors. One frequently cited individual, Erik Erikson, can be found as: Eric Erikson, Erich Ericson, Erik Erickson, Eric Erikkson, Erik Erichson, etc. Since it is usually clear from the document to whom the author is referring, indexers should use the approved Identifier in the IAL.

2. Terms That May Not Be Identifiers

a. Descriptors

Once terms have been approved as valid Descriptors, they may not be used as Identifiers (even if they were formerly in the IAL). The *Thesaurus* always takes precedence over the IAL.

b. Synonyms (UFs) of Descriptors

Synonyms in the *Thesaurus* that are cross-referenced to Descriptors may not be Identifiers. The *Thesaurus* leads the user from these terms to a particular valid Descriptor. To make them Identifiers would undercut this cross-reference and would be contrary to a lexicographic decision already made and recorded.

c. Dead/Invalid Descriptors

Terms that once were valid Descriptors, but that have been deliberately removed from the *Thesaurus* as usable terms, may not be Identifiers. The qualities of these terms that made them undesirable as Descriptors (e.g., ambiguity) also make them undesirable as Identifiers.

d. Variant Forms of Descriptors

Not all variant forms of Descriptors can be inserted into the *Thesaurus* as Ufs. Terms that are merely variant ways of expressing a concept already represented by a Descriptor should not be made Identifiers. The appropriate Descriptor should always be substituted in such cases.

Examples of this situation are as follows:

DESCRIPTORS	VARIANT TERMINOLOGY FOR WHICH THE DESCRIPTOR CAN STAND (AND WHICH SHOULD NOT BECOME IDENTIFIERS)
Neonates	Newborns Neonatal Behavior Neonatal Characteristics Neonatal Research
Performance Contracts	Performance Contracting Student Learning Contracts Contract Teaching Contract Learning Grade Contracts

3. Acronyms

The use of acronyms as Identifiers is discouraged. By their nature, acronyms are prone to being homographs. In general, acronyms may be used when they will not be confused with other words or acronyms. **Figure VIII-2-2** illustrates the kinds of problems experienced with acronyms. **Figure VIII-2-3** displays examples of some acronyms that have been approved for use as Identifiers.

ACRONYMS	DEFINITIONS
ICONS	An acronym for Interagency Conference on Nursing Statistics
Icons	A language term meaning pictorial representation
TACTICS	An acronym for Technical Assistance Consortium to Improve College Service
Tactics	As in tactics for handling labor relations, military situations, etc.
CASE	A computer program
Case	A linguistic term
CASE	An acronym for Council for Administration of Special Education
CASE	An acronym for Council for the Advancement and Support of Education
RIF	An acronym for Reading Is Fundamental
RIF	An acronym (and UF) for Reduction in Force
Rif	A language

FIGURE VIII-2-2: EXAMPLES OF PROBLEMS EXPERIENCED BY USING ACRONYMS AS IDENTIFIERS

AAHPERD	American Alliance for Health,Physical Education, Recreation, and Dance
AFL CIO	American Federation of Labor and Congress of Industrial Organizations
AUDACIOUS	Automatic Direct Access to Information with the Online UDC (Universal Decimal Classification) System
AUSINET	Australian Information Network
BALLOTS	Bibliographic Automation of Large Libraries Using Time-Sharing
CINTERFOR	Centro Interamericano de Investigacion y Documentation sobre Formacion Profesional (Interamerican Research and Documentation Center on Vocational Training)
CDA	Child Development Associate
DIDACTA	European media conference
ERIC	Educational Resources Information Center
INSPEC	Information Services for the Physics and Engineering Communities
MEDLARS	Medical Literature Analysis and Retrieval System
OCLC	Online Computer Library Center
PLATO	Programmed Logic for Automated Teaching Operations
SUPERMARC	Data format standard
UNESCO	United Nations Educational, Scientific, and Cultural Organization
USSR	Union of Soviet Socialist Republics
VAULT	Veterans Accelerated Urban Learning for Teaching

FIGURE VIII-2-3: EXAMPLES OF ACRONYMS APPROVED AS IDENTIFIERS

Identifiers should not be created in the form of the spelled out version followed by the acronym in parentheses (nor should the reverse form of parenthetical spelled out name behind the acronym be used). As much as possible, the spelled out version should be used in lieu of the acronym. Should an indexer wish to associate an acronym with its spelled out version, the place to do so is in the abstract/annotation, as in the following example:

ABST_...Students involved in the project were clients of the Job Training Partnership Act (JTPA) who had participated in the College Level Examination Program (CLEP)...

IDEN_Job Training Partnership Act 1982; College Level Examination Program

---

When a multiword Identifier exceeds 50 characters, it may be necessary to make use of abbreviations (or sometimes acronyms) to keep within the 50-character limit (see below, "Identifier Length").

4. Identifier Length

Identifiers may not exceed a maximum of 50 characters in length (including blanks). Terms naturally exceeding 50 characters must be shortened:

- via the removal of conjunctions, articles, or prepositions, or, if that is insufficient,
- via the abbreviation of common words (see **Figure VIII-2-4**).

The first word of an Identifier should not be abbreviated (except in the case of certain approved acronyms, e.g., "ERIC"). The common words may be abbreviated anywhere else they appear; however, in general, when an Identifier requires abbreviation it is better to abbreviate toward the end of the term rather than toward the beginning. Also, in general, the words in an Identifier that are of greatest significance for searching and retrieval should not be abbreviated. Two examples follow:

Original Term (53 characters)	American Association of Community and Junior Colleges
Abbreviated Identifier (50 characters)	American Association of Community and Junior Colls

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"Colleges" is the best word to abbreviate because it appears in the table of common words and is the last word in the Identifier. "Association" and "Community" might also have been abbreviated, but altering either would cause the term to be moved unnecessarily from its normal alphabetical sequence in the authority list.

Original Term (69 characters)	Federation of Associations in the United States of America and Canada
Abbreviated Identifier (48 characters)	Federation of Associations in the USA and Canada
(Preferred over the following alternative)	Federation Associations United States Canada

"Federation" and "Associations" are the key words for retrieval and should not be abbreviated. The first alternative does the least overall violence to the original name.

5. Numbers

Numbers exceeding one word in length, whether they are a part of or the whole of the concept being indexed, should normally be written as Arabic numerals and not spelled out, unless the spelled out version is the official or formal version.

Examples of Identifiers containing Arabic numbers are:

1984 (Title) NOTE: The qualifier "(Title)" is placed after the names of literary/artistic works that might otherwise not be recognized as such.

1 8 1 8 Plan
4 1 4 Calendar
45 15 Plan
4 H Clubs
Congress 102nd
Hawkins Stafford Act 1988

Examples of Identifiers using spelled out numbers are:

First Born
Fourteenth Amendment
Nineteenth Amendment
One Act Plays
One Parameter Model
One Word Sentence Completion
Second Careers
Three Mile Island
Twentieth Century
Two Stage Testing
Two Way Communication

Academy, Academic	Acad
Administration, Administrators Administrative	Admin
Affiliated, Affiliation	Affil
Agriculture, Agricultural	Agric
American	Amer
Association(s)	Assn
Associate(s)	Assoc
Audiovisual	AV
Behavioral, Behavior	Behav
Biological, Biology	Biol
Biomedical, Biomedicine	Biomed
Board(s)	Bd
Bureau(s)	Bur
Business	Bus
Center(s), Centre(s)	Ctr
Chemistry	Chem
College(s)	Coll
Committee, Community	Comm
Communication(s)	Commun
Conference(s)	Conf
Convention(s)	Conv
Continuing	Cont
Cooperative, Cooperation	Coop
Coordination, Coordinator	Coor
Corporation(s)	Corp
Curriculum	Curr
Department(s), Departmental	Dept
Development, Developmental	Develop
District(s)	Dist
Division(S)	Div
Education, Educational	Educ, Ed
Evaluation	Eval
Faculty, Faculties	Fac
Facility, Facilities	Facil
Federal	Fed
Government	Govt
Guidance	Guid
Hospital(s)	Hosp
Industrial, Industry	Indust
Information	Info
Institute(s), Institution(s)	Inst
Instruction, Instructional	Instr
Interdisciplinary	Interdiscip
International	Intl
Laboratory	Lab
Language(s)	Lang
Library	Lib
Literature	Lit
Mathematics	Math
Metropolitan	Metro
National	Natl
Occupational, Occupations	Occup
Program(s)	Prog
Project(s)	Proj
Psychological	Psych
Research	Res
Research and Development	R and D
School(s)	Sch
Science(s)	Sci
Service(s)	Serv
Session(s)	Sess
Special	Spec
Superintendent(s)	Supt
Teaching, Teacher(s)	Teach
Technical	Tech
Technological, Technology	Techn
Television	TV
University	Univ

FIGURE VIII-2-4: COMMON WORDS THAT MAY BE ABBREVIATED IN IDENTIFIERS WHEN TRUNCATING TO MAKE 50-CHARACTER LIMIT

Roman numerals are generally permitted only when used as the numbers of "Titles" (i.e., sections) in legislation, e.g.:

Elementary Secondary Education Act Title III
Social Security Act Title XX

Some legislation, however, contains Arabic numerals:

Education Consolidation Improvement Act Chapter 1
Rehabilitation Act 1973 (Section 504)

The official or formal version of a numerical concept is always chosen when it can be determined, even if it should vary from the above conventions.

Calendar dates (years, months, days) should always be expressed as numerals, except in those special instances where a date (spelled out) is the title of a literary/artistic work, e.g., "Twelfth of June (Title)."

6. Spelling and Word Form

In general, the same spelling and word form conventions used for Descriptors should also be used for Identifiers. This allows concept-type Identifiers, when appropriate, to "graduate" to Descriptor status with a minimum of alteration. It is also beneficial to searchers if they can rely on ERIC to be consistent in the construction of its index terms.

The spelling of proper names should not be changed from that of the official or formal version, e.g.:

- Centre for Continuing Education (Australia) (Do not change "Centre" to "Center.")
- Organisation for Economic Cooperation [and][1] Development (Do not change "Organisation" to "Organization.")
- Computer Programmer Aptitude Battery (Do not change "Programmer" to "Programer.")

However, American (i.e., United States) English standard usage is followed when common nouns or generics are involved, e.g.:

- Programed Student Achievement
- Testing Centers
- Student Health Organizations

---

[1] "And" deleted to keep name within 50-character limit.

The *Thesaurus'* Rotated Display is an excellent source to consult in determining the proper spelling and/or format for similar words, e.g.

PREFERRED WORD FORM	NON-PREFERRED WORD FORM	GUIDANCE FROM *THESAURUS'* ROTATED DISPLAY
Parent Resources Parent Surveys	Parental Resources Parental Surveys	Parent Associations Parental Background USE Parent Background
Theological Libraries	Libraries (Theological)	Public Libraries Regional Libraries School Libraries (i.e., No inverted entries)
Programed Student Achievement	Programmed Student Achievement	Programed Instruction Programed Tutoring (i.e., No double m's)
Retroaction (Psychology)	Retroaction (Psychological)	Recall (Psychological) USE Recall (Psychology)

7. Non-English Terms

The English language incorporates much terminology from other languages for which there is no exact or simple translation into English, e.g., Deja Vu, Machismo, Roman a Clef. Such terms can regularly be found in English language dictionaries and can therefore be considered part of the normal resources of the language. They need not be translated when used as Identifiers.

In addition, a great deal of Latin terminology can be considered a normal part of English usage, particularly as employed in the fields of law and medicine, e.g., Corpus Delicti, Otitis Media. Such terms likewise need not be translated.

The propensity of English to "borrow" in this way makes it difficult to formulate a single general rule that applies to all non-English terminology.

If a non-English term or phrase can be found in standard unabridged English dictionaries, or in the specialized dictionaries of fields such as law and medicine, then the term may be used as is, without translation. If a term cannot be identified and it can be easily translated, then it should be translated into English; for example, the German "Strahlenchemie" can be translated to "Radiation Chemistry". Translation should be based closely on the original and should not be excessively creative or "free." The objective is to translate in a repeatable way so that if another indexer at another time is faced with the same term the same translation will result. Concepts that cannot be easily translated or have no English equivalent may be entered under the non-English term (and, if needed, defined in the abstract). For example, "Perestroika" was used in the media without translation. When the topic appeared in ERIC documents, it was entered as an Identifier without translation. (Translators should keep in mind that the ERIC database does not provide for diacritical marks of any kind.)

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The use of foreign proper names as Identifiers depends on the way they normally appear in English print. In general, personal names are recorded as close to their appearance in their original language as possible. A good reference to use for personal name form problems is the *Anglo-American Cataloguing Rules.* Organizational names present a more complex problem. Names from languages with non-Roman alphabets (e.g., Cyrillic) are always translated (not just transliterated) into their English equivalent. Names from other languages should follow the practice of the standard international reference work in the field of institutions of education, *The World of Learning.*

Examples of some non-English terms and how they would be handled as Identifiers are displayed in **Figure VIII-2-5.**

Two general references of value are:

- Section 24: "Foreign Languages" of the *GPO Style Manual,* and
- Section 9: "Foreign Languages in Type" of the Chicago *Manual of Style.*

Both contain detailed material on typography, diacritics, capitalization, punctuation, special characters, abbreviation, word division, etc., of all the common foreign languages.

8. Structure (i.e., Cross-References, Scope Notes)

Identifiers do not have the complex cross-reference structure accorded Descriptors, i.e., NTs, BTs, RTs. However, two elements of structure exist for Identifiers in the *Identifier Authority List*: (1) Used For cross-references, and (2) Scope Notes. Either or both of these elements may be added on an "as needed" basis to any given Identifier. The decision to include one or both of these elements is made by the lexicographer at the ERIC Facility.

a. "Used For" Cross-References

Used For cross-references should be used either to indicate preferred name forms or to lead from an abbreviation/acronym to the correct full form, e.g.:

Empire State College NY
    USE State University of New York Empire State Coll

CETA
    USE Comprehensive Employment and Training Act

Cross-references will not normally be made from nonpreferred direct forms (e.g., San Juan Puerto Rico) to preferred inverted forms (e.g., Puerto Rico (San Juan)).

Used For references are limited in length to 50 characters (including blanks).

TERM	NOTE
Avant Garde	"Borrowed" French term.
Blitzkrieg	"Borrowed" German term.
*Carrascolendas (Television Series)	Television Series.
*De Bello Civili	Classical Latin text.
*Diaz del Castillo (Bernal)	Person.
*Dia de los Muertos	Hispanic holiday.
*Globus Hystericus	Medical term (Latin).
*Habeas Corpus	Legal term (Latin).
*Laissez Faire	"Borrowed" French term.
*La Raza Unida Party	Political party. Name commonly used untranslated in both Hispanic and English contexts.
*Machismo	"Borrowed" Spanish term.
*Moscow State University (USSR)	Foreign organization. Translated from Russian (Cyrillic).
*Otitis Media	Medical Term (Latin).
Realites	French Magazine.
*Referendums	Legal term (Latin).
Tae Kwon Do	Martial Art. Transliterated from Japanese.
*Universidad de Educacion a Distancia (Spain)	Foreign organization. Name form retained as is. Country added in parentheses.
*War and Peace	Name of novel. Translated from Russian.
Weltschmerz	German term meaning literally "world weariness" but borrowed by English.

* Existing Identifier

FIGURE VIII-2-5: EXAMPLES OF NON-ENGLISH TERMS AND HOW THEY WOULD BE HANDLED AS IDENTIFIERS

b. Scope Notes

The Scope Note field provides a home for a wide variety of explanatory material bearing on indexing distinctions and clarifications, e.g.,

Ilocano
SN Indonesian Language

AAHPERD
SN Acronym for the American Alliance for Health, Physical Education, Recreation, and Dance

Russia
SN Before 1917 and after 1991, an independent state—see "USSR (Russia)" for the 1917-1991 time frame

In general, Identifier Scope Notes are not used simply to define a term, as is done frequently in the *Thesaurus*. It is not ERIC's intention to provide definitions for the many thousands of relatively obscure Identifiers.

9. Capitalization

Initial capital letters are used for all multi-word Identifiers, except for prepositions, articles, and conjunctions. Exceptions occur in those infrequent cases where the preposition/article/conjunction is the first word of the Identifier, or where it is used in a literary/artistic title.

NORMAL USAGE:	Department of Education
LEADING PREPOSITION:	Off Campus Activities
TITLE:	Graduate (The)

Further examples of usual and exceptional upper/lower case situations for both Descriptors and Identifiers can be found in **Figure VIII-2-6**. (This figure also appears in Section 7: "Indexing" in the discussion entitled "Capitalization of Index Terms.")

10. Word Order

Each Identifier category specifies its own word order conventions. If no guidelines or examples can be found pertinent to a proposed new Identifier, natural word order should be followed.

	DESCRIPTORS		IDENTIFIERS	
ARTICLES/ CONJUNCTIONS/ PREPOSITIONS	**USUAL USAGE (LC) (Example)**	**EXCEPTION (UC) (Example)**	**USUAL USAGE (LC) (Example)**	**EXCEPTION (UC) (Example)**
A	Postsecondary Education as a Field of Study	None	Visit to a Small Planet	A Better Chance Inc
AN	None	None	To an Athlete Dying Young	—
AND	Food and Drug Inspectors	None	Crime and Punishment	And Searching Mind*
AS	Parents as Teachers	None	Maryland Self Concept as a Learner Scale	As You Like It
BY	Management by Objectives	None	ABC (Approach by Concept) Method	By Love Possessed*
FOR	English for Special Purposes	None	Fund for Adult Education	For Whom the Bell Tolls*
IN	Reduction in Force	In School Suspension; In State Students	Catcher in the Rye	In Cold Blood
OF	Leaves of Absence	None	Signers of the United States Constitution	Of This Time of That Place
ON	Time on Task	On Campus Students; On the Job Training	Soul on Ice	On the Origin of Species
OR	Publish or Perish Issue	None	Truth or Consequences Administrative Unit NM*	—
PER	Expenditure per Student	None	—	Per Capita*
THE	State of the Art Reviews	None	College of the Sea (England)	Graduate (The)
TO	Adjustment (to Environment)	None	Pathways to Identity Project	To Kill a Mockingbird

LC = Lower Case; UC = Upper Case
*Not Currently an Identifier

FIGURE VIII-2-6: CAPITALIZATION OF ARTICLES/CONJUNCTIONS/ PREPOSITIONS IN DESCRIPTORS AND IDENTIFIERS

11. Punctuation

With the exception of parentheses, no punctuation may be used in Identifiers. (This restriction refers solely to punctuation within the Identifier itself and does not refer to the semicolon used as a subfield delimiter between multiple Identifiers, or to the asterisk used to tag major Identifiers.) [Hyphens found in Identifiers in online or CD-ROM versions of the database are put there by the vendor for searching purposes to "bind" terms.]

Terms normally having punctuation, e.g., commas, hyphens, apostrophes, ampersands, periods, exclamation marks, quotation marks, colons, slashes, question marks, etc., must be corrected to acceptable forms without punctuation. Examples of such conversions are shown below:

POTENTIAL TERM WITH PUNCTUATION	FINAL ACCEPTABLE IDENTIFIER WITHOUT PUNCTUATION
James E. Allen, Jr.	Allen (James E Jr)
T.S. Eliot	Eliot (T S)
Eugene O'Neill	O Neill (Eugene)
Bloom's Taxonomy	Blooms Taxonomy
45-15 Plan	45 15 Plan
St. Paul Public Schools MN	Saint Paul Public Schools MN
Dick & Jane Readers	Dick and Jane Readers
If You Live in a City, Where Do You Live?	If You Live in a City Where Do You Live
They Shoot Horses, Don't They?	They Shoot Horses Dont They
Oh, God!	Oh God (Title)
"I Heard a Fly Buzz When I Died"	I Heard a Fly Buzz When I Died
Yorkshireman: A Case Study	Yorkshireman A Case Study
Board/Community Relationship	Board Community Relationship

12. Homographs

Homographs (terms with different meanings that have the same spelling) must be differentiated by creating some difference in the spelling or by adding a parenthetical qualifier, e.g.:

TERM	MEANING	DIFFERENTIATED TERMS
PLATO	Computer-assisted education system	PLATO
Plato	Greek philosopher	Plato of Athens
Jupiter	Roman god	Jupiter
Jupiter	Planet	Jupiter (Planet)
Jupiter	Ballistic missile	Jupiter Missile

Homographs cannot be differentiated by creating differences in capitalization and spacing. The ERIC computer system, in comparing index terms during the automatic validation process, converts all terms to upper case and removes blanks and special characters (except the left parenthesis). This procedure means that terms varying only in capitalization and/or the appearance of blank spaces are interpreted by the computer as the same term.

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TERMS VARYING ONLY IN CAPITALIZATION OR BLANK SPACES (HYPOTHETICAL)	AS TRANSLATED BY COMPUTER FOR COMPARISON PURPOSES
Project Out Reach	PROJECTOUTREACH
Project OUTREACH	"
Project Outreach	"

If the above variant forms were actually used by ERIC indexers and were appearing together in an index, all the variants would validate, but the printed/displayed index entry would be determined by the particular variant that appeared first in the sequence of accessions involved, i.e., that was read first by the computer.

It is clearly undesirable for terms varying only by capitalization and spacing to be placed in the ERIC file. In addition to creating potentially confusing index entries, such terms can adversely affect retrieval efforts. For example, to retrieve all the accessions using the three "Projectoutreach" variant forms cited above, a searcher would have to use two distinct search strategies:

Outreach/ID
Out (w) Reach/ID

13. Special Indexing Arrangements

From time to time ERIC makes formal arrangements with specific organizations or programs to index the document output of that organization in a special way in order to facilitate retrieval. Usually these are organizations and projects funded by some element of the Department of Education, e.g., National Diffusion Network (NDN), National Assessment of Educational Progress (NAEP). All current agreements are summarized in **Figure VIII-2-7**. Whenever additional agreements are made, they are usually communicated to the Clearinghouses via electronic mail and/or the *ERIC Administrative Bulletin* (EAB).

In addition, Identifiers are occasionally developed for systemwide use in order to facilitate retrieval of specific classes of documents, e.g., America 2000, National Education Goals 1990, etc.

From time to time Clearinghouses agree to assign specific Identifiers, e.g., the Clearinghouse on Higher Education annually enters all of the papers from the Association for Institutional Research (AIR) annual forum and assigns the Identifier "AIR Forum" to each paper. By coordinating the Identifier and the publication date, a user is thus able to retrieve all of the papers from a specific annual meeting. While such Identifier use is at variance with the rule to index the subject of documents, such use of the Identifier field for specific retrieval purposes is permitted on a selective basis.

Clearinghouses wishing to use an Identifier in a special way are encouraged to coordinate the proposed Identifier with the Facility lexicographic staff prior to the transmission of a large number of documents using such a term.

ORGANIZATION NAME OR TYPE OF DOCUMENT	INDEXING GUIDELINES
ERIC Digests Produced by Clearinghouses	All Digests emanating from the ERIC Clearinghouses are indexed by the minor Identifier "ERIC Digests."
National Assessment of Educational Progress (NAEP)	The NAEP is currently operated by the Educational Testing Service. All NAEP documents should be indexed: (1) by "National Assessment of Educational Progress; and (2) by the name of the specific assessment, if that is the topic of the document (e.g., Reading Assessment (1992)). If the document concerns results from the trial state assessments, the Identifier "Trial State Assessment (NAEP)" should be assigned along with the assessment name, e.g., "State Mathematics Assessments," and the name of the state, e.g., "Minnesota."
National Diffusion Network (NDN)	Documents about NDN should be indexed by the (preferably major) Identifier "National Diffusion Network." Documents generated by programs or projects under NDN sponsorship should be indexed by the minor Identifier "National Diffusion Network Programs," and also by an Identifier (preferably major) for the specific program/project name, e.g., "Project Adventure."
Program Effectiveness Panel (PEP) [Successor to the Joint Dissemination Review Panel (JDRP)]	Documents describing PEP or JDRP validated programs should be indexed by the minor Descriptor "Validated Programs."[2] (Documents dealing with the actual subject matter of validation should be indexed with the Descriptor "Program Validation.")

FIGURE VIII-2-7: SPECIAL INDEXING ARRANGEMENTS

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[2] As of June 1992, a project to enter PEP/JDRP program applications into ERIC is under discussion. If the project is implemented, additional guidelines will be provided for indexing these documents.

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D. Guidelines Applying to Identifiers in Specific Categories

Every Identifier is assigned by the ERIC Facility to one (and only one) of the twenty broad categories listed in **Figure VIII-2-1**. The category number is assigned to the Identifier at the time it is entered into the Identifier Authority List (IAL). Identifier categories serve the same purpose for Identifiers that Descriptor groups do for Descriptors, i.e., browsing and easy scanning of large numbers of terms that may be of interest within a given area.

Individual listings of Identifiers by category are published at the same time as complete alphabetical cumulations are published. Certain older categories (01 for "Acronyms" and 06 for "Foreign Words and Phrases") have been discontinued; therefore, the only active category numbers are 02-05, 07-22.

While the rules discussed up to this point apply generally to all Identifiers, the guidelines that follow are grouped by category and apply only to terms in that specific category.

1. Conferences/Meetings (Category 02)

This category brings together the formal names of gatherings held either regularly or on a one-time basis. It is not to be confused with organizational names containing the word "Institute" or "Conference."

Identifiers for conference/meeting names are generally appropriate only when the meeting is the subject of the document. They are not normally appropriate as simply a way to tag all of the papers or proceedings from a particular meeting. The Descriptive Note field is the proper field to identify the meeting at which a paper was given. A meeting may be the subject of a document when, for example, the document is analyzing the results of a meeting, the need for a meeting, the ramifications of resolutions passed, the impact of a meeting, or the design of a meeting. However, as was noted in Section VIII-2-C.13, "Special Indexing Arrangements," on occasion Identifiers are used to "gather" for identification purposes all of the papers of a specific conference.

Natural word order is followed, without artificial inversions, e.g.:

ASHE Annual Meeting
Brookings Conference on Vocational Education
Claremont Reading Conference
White House Conference Library Info Services

Since conference names are often long and may exceed the 50-character limit, abbreviation is frequently required. Using an acronym for the organization involved is an acceptable technique, e.g.:

Conference:	National Council of Teachers of English Seminar on Research in English Education (80 characters)
Use:	NCTE Seminar on Research in English Education (45 characters)

Conferences that occur regularly under the same name, with only the date differing, should be entered under the standard name without date. Material for specific years can be retrieved by coordinating Identifier with Publication Date.

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Since the geographic location of a conference is usually incidental and inconsequential, conference name Identifiers should almost never use forms such as "New York Conference," "Conference at Idaho Falls," etc.

Names should always be as complete as possible, especially as to the topic of the gathering, e.g.:

Use: Rutgers Conference on School Lunch Programs

Do Not Use: Rutgers Conference

2. Curriculum Areas (Category 03)

This category contains names of courses, listings in catalogs, teaching sequences, specific curricula, and other curriculum-related terms, e.g.:

Biological Sciences Curriculum Study
Business Law
Chicano Studies
Man A Course of Study

Curriculum series are frequently the end result of a project or program and may be referred to by the project/program name as well as by the curriculum name. In such situations, one name should be selected as the preferred form, e.g.:

Preferred Identifier: Bereiter Engelmann Curriculum

Non-Preferred Synonyms: Bereiter Engelmann Method
Bereiter Engelmann Preschool Program
Bereiter Engelmann Program
Bereiter Engelmann Language Training Program

3. Equipment (Category 04)

This category contains the names of specific equipment, computer hardware, software, programing languages, materials, classroom aids/tools, etc. Examples are:

Abacuses
Answering Machines
BASIC Programing Language
Binoculars
IBM Personal Computer
Lockers
Lotus 1 2 3
PASCAL Programing Language

Kinds of equipment should be entered in the plural form, e.g., "Thermostats.

Programing languages should not be entered under the acronym alone, but should have the phrase "Programing Language" appended, e.g.:

BASIC Programing Language
PASCAL Programing Language
PL 1 Programing Language

4. **Facilities (Category 05)**

This category includes types of physical facilities or organizations. It excludes the names of specific organizations. Examples are:

Boards of Cooperative Educational Services
Chambers of Commerce
ERIC Clearinghouses
Montessori Schools
Stadiums
Textile Industry

Facilities Identifiers generally should be constructed in the plural form (as above). Concepts from a non-U.S. context that might be misconstrued should have an appropriate qualifier added, e.g.:

Farmer Training Centres (Kenya)
Separate Schools (Canada)

5. **Geographic Locations (Category 07)**

This category contains the names of continents, countries, provinces, states, territories, regions, counties, cities, parks, and all types of physical formations (e.g., rivers, mountains, deserts, valleys, deltas, islands, peninsulas, etc.). Examples are contained in **Figure VIII-2-8.**

a. **Format**

Names of the fifty (50) U.S. states and the twelve (12) Canadian provinces/territories are entered directly. Names of communities, cities, and counties in the U.S. and Canada are not entered directly; instead, these smaller political subdivisions are entered as parenthetical qualifiers to the name of the particular state or province in which each resides.

All Identifiers for countries other than the U.S. and Canada are entered with the name of a country followed by geographic subdivisions in parentheses, as appropriate. These procedures are followed in order to provide easy access to both generic and specific geographic levels (e.g., all Alabama localities will appear under the state name "Alabama," as for example "Alabama (Jefferson County)," "Alabama (Mobile)," etc.).

For purposes of this guideline, the "District of Columbia" and the U.S. "Possessions" (i.e., "American Samoa," "Guam," "Northern Mariana Islands," "Puerto Rico," and "Virgin Islands") are considered on the same level as states. Also, divisions of the United Kingdom (i.e., "England," "Northern Ireland," "Scotland," and "Wales") are considered on the same level as countries. "Preferred" country names are included in the relatively complete list that immediately follows this discussion.

The names "United States," "Canada," and "United Kingdom" are normally used without qualifiers. However, these and all other place names may be qualified by common directional notations (e.g., "west," "southeast," "north central," "midwest"), which would be ambiguous if left standing alone. Typical entries of this type would be: "Canada (Northwest)," "Europe (East)," "Mexico (North Central)." Official names such as "North Carolina" and "Northwest Territories," and meaningful concepts such as "Middle East," are, of course, not considered directional notations.

Excluding the country Australia, continents may only be subdivided by directional notations or by large nonpolitical areas, e.g., "Africa (Sub Sahara)," "Africa (Tropical)," "Asia (Central)," "Asia (West)," "Europe (East Central)."

Africa (East)
Alabama
Alberta (Calgary)
Antarctica
Appalachia
Asia (Southeast)
Atlantis
Australia (Melbourne)
Baltic States
California (Los Angeles)
District of Columbia
Easter Island
England (London)
Europe
Everglades
Florida (Hollywood)
Ganges River
Germany
Gondwanaland
Great Plains
Greenland
Guam (Agana)
Hong Kong
Italy (Sicily)
Lake Michigan
Maryland (Montgomery County)
Massachusetts (Cambridge)
Massachusetts (Springfield)
Mississippi Delta
Missouri (Saint Louis)
Mount Whitney
New York (Harlem)
New York (Manhattan)
New York (New York)
New York (Niagara Falls)
Niagara Falls
Nile River
Northern Mariana Islands
Ontario (Ottawa)
Pacific Ocean
Quebec (Quebec)
Russia (Moscow)
Sahara Desert
Scandinavia
Siberia
South America
South Korea (Seoul)
Sweden (Stockholm)
Texas (Paris)
Timor
United States (South)
Wales
Washington (Seattle)
Wisconsin (Eau Claire County)
Yakima Valley
Yosemite National Park
Yugoslavia (Serbia)

FIGURE VIII-2-8: EXAMPLES OF HOW GEOGRAPHIC LOCATIONS ARE ENTERED AS IDENTIFIERS

Names of overseas territories and natural geographic features and regions are entered directly and not as qualifiers to a larger entity, e.g.,

PREFERRED FORM	DO NOT USE
Easter Island	Chile (Easter Island)
Everglades	Florida (Everglades)
Siberia	Russia (Siberia)

Existence of a geographic location and its proper spelling should be verified in standard unabridged geographic dictionaries or gazetteers, e.g., *Webster's New Geographical Dictionary, Lippincott's Gazetteer.*

b. Subject versus Geographic Source

Do not confuse subject matter with geographic source. Geographic Identifiers are intended to reflect the subject matter of a document, i.e., the area studied, the area from which the data were gathered, etc., and are not intended to reflect the location of an institution doing the work, the location of an institution to which an author is affiliated, or the location of a publisher.

RIE carries a separate field to specifically identify the "Geographic Source" of a document. Although CIJE journal article records do not carry this same field, the use of Identifiers to indicate geographic source should be strictly avoided, as such a practice is misleading and detrimental to subject retrieval.

c. Homographs

Care should be taken in interpreting geographic locations cited in the text of documents. For example, twenty-four (24) states have a "Jefferson County"; eighteen (18) states have a "Springfield" town/city/village. Make certain that the name being used is correctly identified as to state, province, etc., and that it is not confused with a similar name from another location.

d. Institutions and Geographic Identifiers

Do not confuse institutions and geographic Identifiers. For example, if the subject of a document is the policies of the Chicago Public Schools, assign the specific organizational Identifier "Chicago Public Schools IL" and not the more general geographic Identifier "Illinois (Chicago)." If the document perhaps also includes the subject of the impact of these policies on the citizens of Chicago, then the Identifier "Illinois (Chicago)" would also be appropriate.

e. Country Names

Always also use the minor Descriptor FOREIGN COUNTRIES when indexing foreign country names as subjects. Country names may be major or minor, followed by city or other geopolitical subdivision, if appropriate, in parentheses.

Be precise and specific in assigning country Identifiers. For example, do not use "Great Britain" unless the subject is truly the United Kingdom excluding Northern Island. "Russia" should be used as a country name for the period before 1917 and after 1991; for the period in-between, the preferred term is "USSR (Russia)."

Do not automatically "index up" to the broad levels "United States," "Canada," and "United Kingdom." A document should be indexed by more than one level of geographic Identifier only if it genuinely deals with dual or multiple levels.

"United States" should be used sparingly, usually for various regional subdivisions, e.g., UNITED STATES (SOUTH), or for overall comparisons with other countries. Otherwise, it is implied by its absence.

Do not use AFRICA (continent) in lieu of more specific African countries.

f. Preferred Country Names

The four lists that follow display:

(1) the U.S. "possessions";

(2) the provinces and territories of Canada;

(3) the divisions or states of the United Kingdom;

(4) preferred name forms for most of the world's existing countries.

The fourth list contains a small number of cross-references. "Use" references have been made from some common but nevertheless non-preferred forms to the preferred forms, e.g., "Britain, Use Great Britain." The reciprocal of a Use reference is a "Used For" (UF) reference. "See" references have been made from older name forms to current name forms. These older names, which are sometimes appropriate for the indexing of older or historical documents, are preceded by an asterisk (*). The reciprocal of the See reference is a "Seen From" (SF) reference.

List 1: United States "Possessions"

(quasi-independent states are *italicized* and also appear in List 4)

- American Samoa
- *Federated States of Micronesia*
- Guam
- *Marshall Islands*
- Northern Mariana Islands
- *Palau*
- Puerto Rico
- Virgin Islands

List 2: Canadian Provinces and Territories

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland
- Northwest Territories
- Nova Scotia
- Ontario
- Prince Edward Island
- Quebec
- Saskatchewan
- Yukon Territory

List 3: United Kingdom Divisions or States

- England
- Northern Ireland
- Scotland
- Wales

List 4: Preferred Country Names

(* = older name form)

- Afghanistan
- Albania
- Algeria
- Andorra
- Angola
- Anguilla
- Antigua and Barbuda
- Argentina
- Armenia
- Aruba
- Australia
- Austria
- Azerbaijan
- Bahamas
- Bahrain
- Bangladesh
  - SF East Pakistan
- Barbados
- Belarus
- Belau
  - USE Palau
- Belgium
- Belize
  - SF British Honduras
- Benin
  - SF Dahomey
- Bermuda
- Bhutan
- Bolivia
- Bophuthatswana
- Bosnia and Herzegovina
- Botswana
- Brazil
- Britain
  - USE Great Britain
- *British Guiana
  - SEE Guyana
- *British Honduras
  - SEE Belize
- Brunei
- Bulgaria
- Burkina Faso
  - SF Upper Volta
- *Burma
  - SEE Myanmar
- Burundi
- Cambodia
  - UF Kampuchea
  - SF Khmer Republic
- Cameroon
- Canada
  - NOTE When appropriate, use province (see List 2, above)
- Cape Verde
- Central African Republic
- *Ceylon
  - SEE Sri Lanka
- Chad
- Chile
- China
  - NOTE Do not confuse with Taiwan
  - UF Mainland China; Peoples Republic of China
- Ciskei
- Colombia
- Comoros
- Congo
- Cook Islands
- Costa Rica
- Croatia
- Cuba
- Cyprus
- Czechoslovakia
- *Dahomey
  - SEE Benin
- *Democratic Yemen
  - NOTE Merged into Yemen (q.v.) and dissolved in May90
  - UF Southern Yemen
- Denmark
- Djibouti
- Dominica
- Dominican Republic

*East Germany
  NOTE Reunified into "Germany" in Oct90
  UF German Democratic Republic
*East Pakistan
  SEE Bangladesh
Ecuador
Egypt
El Salvador
Estonia
*Ellice Islands
  SEE Tuvalu
Equatorial Guinea
Ethiopia
Federal Republic of Germany
  USE West Germany
Federated States of Micronesia
  UF Micronesia (Federated States)
Fiji
Finland
*Formosa
  SEE Taiwan
France
*French Guiana
  SEE Guiana
French Polynesia
Gabon
Gambia
Georgia
  NOTE Use for both U.S. state and west Asian nation
German Democratic Republic
  USE East Germany
German Federal Republic
  USE West Germany
Germany
  NOTE See "East Germany" and "West Germany" for the 1945-1990 time frame
Ghana
*Gilbert Islands
  SEE Kiribati
Great Britain
  NOTE When appropriate, use England, Scotland, or Wales
  UF Britain
Greece
Grenada
Guadeloupe
Guatemala
Guiana
  SF French Guiana
Guinea
Guinea Bissau
Guyana
  SF British Guiana
Haiti
*Holland
  SEE Netherlands
Honduras
Hong Kong
Hungary
Iceland
India
Indonesia
Iran
Iraq
Ireland
Israel
Italy
Ivory Coast
Jamaica
Japan
Jordan
Kampuchea
  USE Cambodia
Kazakhstan
Kenya
*Khmer Republic
  SEE Cambodia
Kirgizstan
Kiribati
  SF Gilbert Islands
*Korea
  SEE North Korea; South Korea
Kuwait
Laos
Latvia
Lebanon
Lesotho
Liberia
Libya
Liechtenstein
Lithuania
Luxembourg
Macao
Macedonia

- Madagascar
  - SF Malagasy Republic
- Mainland China
  - USE China
- *Malagasy Republic
  - SEE Madagascar
- Malawi
- Malaysia
- Maldives
- Mali
- Malta
- Marshall Islands
- Martinique
- Mauritania
- Mauritius
- Mexico
- Micronesia (Federated States)
  - USE Federated States of Micronesia
- Moldova
- Monaco
- Mongolia
- Montserrat
- Morocco
- Mozambique
- Myanmar
  - SF Burma
- Namibia
  - UF South West Africa
- Nationalist China
  - USE Taiwan
- Nauru
- Nepal
- Netherlands
  - SF Holland
- Netherlands Antilles
- New Caledonia
- New Hebrides
- New Zealand
- Nicaragua
- Niger
- Nigeria
- Niue
- North Korea
  - SF Korea
- *North Vietnam
  - SEE Vietnam
- Norway
- Oman
- Pakistan
  - SF West Pakistan
- Palau
  - UF Belau
- Panama
- Papua New Guinea
- Paraguay
- Peoples Republic of China
  - USE China
- Peru
- Philippines
- Poland
- Portugal
- Qatar
- Reunion
- *Rhodesia
  - SEE Zimbabwe
- Rumania
- Russia
  - NOTE See "USSR" and "USSR (Russia)" for the 1917-1991 time frame
- Rwanda
- Saint Kitts and Nevis
- Saint Lucia
- Saint Vincent and the Grenadines
- San Marino
- Sao Tome e Principe
- Saudi Arabia
- Senegal
- Seychelles
- Sierra Leone
- Singapore
- Slovenia
- Solomon Islands
- Somalia
- South Africa
- South Korea
  - SF Korea
- *South Vietnam
  - SEE Vietnam
- South West Africa
  - USE Namibia
- Southern Yemen
  - USE Democratic Yemen
- Spain
- *Spanish Sahara
  - SEE Western Sahara
- Sri Lanka
  - SF Ceylon

Sudan
Surinam
Swaziland
Sweden
Switzerland
Syria
Taiwan
UF Nationalist China
SF Formosa
Tajikistan
*Tanganyika
SEE Tanzania
Tanzania
SF Tanganyika
Thailand
Togo
Tonga
Transkei
Trinidad and Tobago
Tunisia
Turkey
Turkmenistan
Turks and Caicos Islands
Tuvalu
SF Ellice Islands
Uganda
Ukraine
United Arab Emirates
United Kingdom
NOTE When appropriate, use "country" (see list 3, above)
United States
NOTE When appropriate, use name of state or possession (see "possessions" in List 1)
*Upper Volta
SEE Burkina Faso
Uruguay
*USSR
NOTE Established in 1917, dissolved in 1991—use "Russia" or the names of other former republics directly after 1991
Uzbekistan
Vanuatu
Vatican City State
Venda
Venezuela
Vietnam
SF North Vietnam; South Vietnam
Wallis and Futuna Islands
*West Germany
NOTE Reunified into "Germany" in Oct90
UF Federal Republic of Germany; German Federal Republic
*West Pakistan
SEE Pakistan
Western Sahara
SF Spanish Sahara
Western Samoa
Yemen
NOTE North Yemen and South (Democratic) Yemen were united in May90
Yugoslavia
NOTE States achieving independence in 1991-early 1992 were "Bosnia and Herzegovina," "Croatia," "Macedonia," and "Slovenia" (see separate entries)
Zaire
Zambia
Zimbabwe
SF Rhodesia

6. Groups (Ethnic) (Category 08)

This category contains the names of groups of people related by ethnic, cultural, racial, or national factors.

a. Plural versus Singular

American Indian groups are entered in the singular (see special instructions under item "d" below). All other groups are entered in the plural form. Examples are:

Africans
British
Canadians
English Canadians

b. Group Names versus Language Names

Group names and language names are often homographs. The convention observed by ERIC is to modify the group name to distinguish it from the language name. For example,

Group (from IAL)	Language (from Thesaurus)
Apache (Tribe)	Apache
Chinese People	Chinese

c. Identifier Groups vs. Descriptor Groups

Some ethnic groups are Descriptors, e.g., Spanish Americans. Indexers must, therefore, check both the *Thesaurus* and the *IAL* before entering groups in either field.

Some subgroups of an ethnic group must be indexed coordinately using both Identifiers and Descriptors, e.g.,

Indexable Concept	African Children
Index Terms	**Identifier:** Africans **Descriptor:** Children

d. American Indians

An American Indian group may be designated as a tribe, band, people, or nation. American Indian groups are not pluralized, but are entered in the singular form, e.g., Apache (Tribe) not Apaches. Examples are:

Aleut (Tribe)
Cherokee (Tribe)
Cherokee Nation
Cheyenne (Tribe)
Chippewa (Tribe)
Navajo (Nation)
Pueblo (People)

All American Indian groups may be further subdivided. In such cases, the specific subgroup should be qualified by the name of the larger group, e.g.,

Laguna (Pueblo)

Certain broad American Indian group names that are neither tribe, band, nor nation, emanate from the discipline of anthropology and can be qualified as such to indicate to non-specialists that the terms are well-defined and authoritative, e.g.,

Plains Indians (Anthropology)

For consistency throughout the system, the following indexing conventions should be observed when indexing American Indian groups:

AMERICAN INDIAN GROUP BEING INDEXED	PREFERRED METHOD	
• those residing in the 48 contiguous United States	Descriptor: Identifier:	American Indians Tribal Name; State (if appropriate)
• those residing in Alaska	Descriptor: Identifier:	American Indians; Alaska Natives Tribal Name
• those residing in Canada	Descriptor: Identifier:	American Indians; Canada Natives Tribal Name; Province (if appropriate)
• those residing in Western Hemisphere, south of the Rio Grande	Descriptor: Identifier:	American Indians Tribal Name; Country (if appropriate)

e. Miscellaneous

Persons residing in the United States who are commonly referred to in the literature as "Americans" should be indexed by the Identifier:

Americans (United States)

7. Groups (Occupations) (Category 09)

This category contains the specific or collective names of occupations. All group names are formed and pluralized in accordance with the current *Dictionary of Occupational Titles* (U.S. Department of Labor). This ensures that occupational titles used by ERIC are in sex-neutral formats. Examples are:

Contract Officers
Conveyor Operators
Documentalists
English Teachers
Foundry Occupations
Line Repairers
Procurement Personnel

Because ERIC is an education-related database and not one emphasizing labor or business, occupational group names should not be created with excessive specificity. In addition, since the ERIC *Thesaurus* already contains many occupational groups, it should always be consulted before new Identifiers are created. The following consolidations illustrate both guidelines:

PREFERRED TERM	NON-PREFERRED IDENTIFIER(S)
Textile Occupations (Identifier)	Folders (Garment) Knitting Machine Operators Yarn Winders
Dietitians (Descriptor)	Clinical Dietitians Community Dietitians
Laundry Drycleaning Occupations (Descriptor)	Hand Pressers Shirt Pressers Launderers Laundry Bundlers

Each occupation has a corresponding activity. Often the only difference between the two is the ending, with the occupation ending in "-ers" or "-ors" and the activity ending in "-ing." There is no general rule for preferring one word form over the other and the literature itself generally dictates which form is first used for indexing. However, both forms are usually not needed in the same vocabulary and if one already exists the other should not be created. For example, given a document on the training of woodworkers, use the existing Descriptor "Woodworking." Do not establish a new "Woodworkers" population term. Cover the population with the existing Descriptors "Semiskilled Workers" or "Skilled Workers," as appropriate.

NOTE: Occupation/Activity overlaps currently exist between some Identifiers and/or Descriptors. These are reviewed as detected and generally one term is discontinued in favor of another (to which postings are transferred). A current example of this type is the Identifiers "Weavers" and "Weaving."

8. Groups (Other) (Category 10)

This category gathers together population groups which share one or more characteristics, excluding ethnic or occupational characteristics. Examples are:

Consumers
English Majors
Nondegree Students
Tenants

All term forms are plural.

Population groups whose unifying characteristic is a philosophy or religion should not be created as a group name, but should be indexed under the name of the philosophy or religion and assigned to Identifier Category 16, e.g.:

PREFERRED (Category 16—Miscellaneous)	NON-PREFERRED
Atheism	Atheists
Christian Science	Christian Scientists
Idealism	Idealists

9. Health-Related (Including Psychology) (Category 11)

This category contains the names of diseases, sicknesses, and disorders. In addition, it contains terms related to medicine, physiology, nutrition, and drugs. Psychology and mental health are included. However, health-related equipment is assigned to Category 4—Equipment. Examples are:

Approach Avoidance Conflict
Aspirin
Chromosomes
Electromyography
Hemoglobin
Noonan Syndrome
Self Examinations (Physical)

Many medical concepts have both an English and a Latin name. Selection of the appropriate name in these instances should depend on usage by the medical profession. A primary reference for determining this usage is the National Library of Medicine's *Medical Subject Headings--Annotated* (MeSH). MeSH should also be considered the authority for resolving any spelling variances.

Psychological terms are heavily represented in this category. The primary reference that should be consulted to determine usage, format, and spelling is the American Psychological Association's *Thesaurus of Psychological Index Terms*. Terms in the field of psychology are prone to being homographs and as a result must often be qualified in order to distinguish them properly.

Examples are:

Crystallization (Psychology)
Patterning (Neurology)
Retroaction (Psychology)
Specimen Records (Behavior)
Vital Signs (Physiology)

Parenthetical qualifiers/modifiers should be in the same format as in the ERIC *Thesaurus*.

NOTE: Some older qualifier/modifier formats still exist in the Identifier file and are gradually being converted.

Many of the Identifiers in this category eventually become Descriptors. For this reason, indexers contemplating the establishment of a new health-related Identifier should always take particular care to check the ERIC *Thesaurus* first. The Descriptor Group family "Physical and Mental Conditions" (groups 210, 220, 230, and 240) is one good means of conducting such a review.

10. Historical/Special Events (Category 12)

This category contains the names of special days, movements, historical periods, and periodic events usually having a state, national, cultural, or historical significance. Examples are:

Black History Month
Gulf War
Jacksonian Era
National Library Week
Nineteenth Century

Names of events that could be homographs should have geographic location, date, or other qualifier added, e.g.:

Cultural Revolution (China)
Depression (Economic 1929)

Class trips, special days honoring local individuals, and events that have very limited usefulness in themselves as index terms should not be established, but should be represented by more generic Identifiers or Descriptors, e.g.:

NON-PREFERRED	PREFERRED	
	DESCRIPTOR	IDENTIFIER
Yellow Ribbon Day	Class Activities	Iranian Hostages
Harvard 1991 Reunion	Alumni	Class Reunions Harvard University MA

11. Languages/Linguistics (Category 13)

This category contains the proper names of languages, as well as all other language/linguistic-related concepts, grammatical, syntactical, and speech-related terminology. Examples are:

Bahnar
Balto Finnic Languages
Bangkok Dialect
Bitransitive Clauses
Commas
Connectives (Grammar)

The ERIC *Thesaurus* contains many languages (Descriptor Group 440—Languages) and should always be consulted before adding any language names to the Identifier field. Subdivisions and dialects of languages are generally not in the *Thesaurus* and may be entered as Identifiers; however, dialects used by a small number of people should usually not be indexed. Instead, index the language of which it is a dialect and include the dialect name in the Abstract where it can still be retrieved. In order to keep all terms concerning a given language together, the Identifier is created with the main language first followed by the subdivision, dialect, or other qualifier, e.g.:

English (British)
English (Canadian)
Turkish (Ottoman)

Before creating a new "language" Identifier, indexers are encouraged to call the ERIC Clearinghouse on Languages and Linguistics for advice, or to use one of the following authorities:

Classification and Index of the World's Languages by C. F. and F. M. Voegelin (Elsevier, 1977).

Ethnologue (10th edition), by Wycliffe Bible Translators (1984).

Ethnic groups and their corresponding language are often spelled the same in common usage. The guidelines in Category 8-Groups (Ethnic) describe methods to distinguish group from language, e.g.:

CONCEPT	PREFERRED	
	DESCRIPTOR	IDENTIFIER
People of Greece		Greeks
Language of Greece	Greek	
Tlingit (Eskimo Language)		Tlingit
Tlingit (Eskimo Tribe)		Tlingit (Tribe)

NOTE: The language of the document itself should not be indexed in the Identifier field. A special field (LANG) exists for specifying the language of the document.

12. Laws/Legislation (Category 14)

This category contains laws and enacted legislation, court cases, and legal concepts that are the subject of a document.

Examples of typical terms in this category are:

Canada United States Free Trade Agreement 1989
Civil Rights Act 1968 Title II
Carl D Perkins Voc and Appl Techn Educ Act 1990
Education Reform Act 1988 (England)
Eminent Domain
Hawkins Stafford Act 1988
Lau v Nichols
Oklahoma City Public Schools v Dowell
Teacher Tenure Act (Michigan)
Title IX Education Amendments 1972

Legislation that establishes a program under which a given document is funded should not be confused with the document's subject.

Identifiers in the "Laws/Legislation" category exhibit more variations in the literature in which they occur than those in any other category. While standard citations exist in the formal legislative literature, it is common for authors to refer to legislation simply by "Title" or "Chapter" number, assuming that the reader will know by the context the specific act that is being referenced. At the same time, the nature of the material is such that it is often of great interest to the education community, and large numbers of postings may be generated for a single law or court case. It is, therefore, incumbent on indexers to exercise special care in creating new Identifiers for this category.

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a. "Short Titles" and Popular Names

Legislation should generally be entered by official "short titles," frequently assigned as convenient labels at the time the legislation (especially Federal) is formally enacted. Example:

PREFERRED "SHORT TITLE"	NON-PREFERRED FORMAL DESIGNATOR
Higher Education Act 1965	Public Law 89 329

Sometimes, however, "short titles" are less known and less frequently used than other "popular" names. Example:

PREFERRED POPULAR NAME	NON-PREFERRED "SHORT TITLE" [AND] FORMAL DESIGNATOR
Fulbright Hays Act	Mutual Educational and Cultural Exchange Act 1961 Public Law 87 256

Although much legislation is identified by the word, "Act," another frequent designator is the word "Program." Examples:

Perkins Loan Program
Stafford Student Loan Program

Because technically they are legislative acts, such "programs" are assigned to Category 14—Laws/Legislation, rather than to the less precise Category 19—Projects/Programs.

Because of the multiplicity of alternative name forms in this category and the difficulties inherent in the task of choosing the "most popular" name, appropriate USE/UF cross-references in the IAL become essential in leading indexers to the preferred terms.

b. "Title" Numbers

Federal legislation is typically subdivided into "Titles" (identified always by Roman numerals). Title numbers may be appended to the end of broad names of legislation to create narrower and more distinctive Identifiers. Some Federal legislation is subdivided by "Chapters" and these are usually identified by Arabic numerals. Examples:

Social Security Act Title XX
Elementary Secondary Education Act Title III
Education Consolidation Improvement Act Chapter 1
Education Consolidation Improvement Act Chapter 2

A broad name without subdivision, such as "Social Security Act," should be used only when the document truly deals with the entire body of legislation represented by the name of the act.

The Title or Chapter number alone should never be used as an Identifier, as it has meaning only in relation to a particular act. There are rare circumstances, however, in which a piece of legislation becomes commonly known only by its Title number and never acquires a popular name. An example is Title IX of the Education Amendments of 1972, which deals with sex discrimination. In such a situation, it is permissible to use the Title number preceding the legislation of which it is a part, e.g.:

Title IX Education Amendments 1972

This form, however, should be avoided as much as possible.

Like broad legislative name forms, sometimes individual legislative "Titles" also become better known and more widely cited by other names. In these cases, the more "popular" name forms are chosen as preferred Identifiers. Examples:

PREFERRED POPULAR NAME	NON-PREFERRED "TITLE" NAMES
Emergency School Aid Act 1978	Education Amendments 1978 Title I
Ethnic Heritage Studies Program	Elementary Secondary Education Act Title IX E

c. Year

Whenever possible, if the 50-character limit permits, the year that the legislation was enacted should be appended as an integral part of the Identifier. In some cases, citing the year can be imperative in order to distinguish separate laws bearing the same basic name, e.g.:

Civil Rights Act 1871
Civil Rights Act 1964
Civil Rights Act 1991

These citations normally would contain the word "of," as in "Civil Rights Act of 1964." In all such cases, the common word "of" is removed as part of the preferred Identifier.

d. Public Law Numbers

Public Law numbers, e.g., "Public Law 102 35," should always be avoided as Identifiers unless there are no alternative "short titles" or popular names to use.

e. Proposed Federal Legislation

Names of proposed laws frequently change and should not be entered as Identifiers; proposed legislation sometimes takes years to be passed, if it passes at all, and the name of the legislation will normally have gone through numerous changes. It is, therefore, better to use the Identifier, "Proposed Legislation," along with appropriate generic Descriptors or Identifiers. The specific name of the proposed legislation typically appears in the Title and/or Abstract field, in any case.

Proposed Federal legislation may only occasionally be entered in the IAL, and then only in the form of a House or Senate Bill number. A House Bill is preceded by "H R," a Senate Bill by "S." Since Congressional Bill numbers begin again with each new Congress (i.e., every two years), it is essential to follow the Bill number by the number and session of the Congress in order to identify it uniquely, e.g.:

S 6 (93d Cong 1st Sess)

Because of the relatively brief "life spans" of such concepts, they are usually avoided as Identifiers. They are justified as Identifiers only if they have considerable significance for the field of education and promise to have more than one posting in the ERIC database.

f. State and Foreign Legislation

State legislation (or the legislation of a Canadian province) should be entered under its name followed by the name of the state (or province) in parentheses, e.g.:

Public Employment Relations Act (Michigan)

State legislation may be subdivided into titles, chapters, etc. As with Federal legislation, the most commonly used form is chosen as the preferred Identifier, with cross-references from non-preferred forms added to the IAL as needed.

Legislation of countries other than the United States should be entered in the same manner, e.g.:

Education Act 1968 (Kenya)
Endowed Schools Act 1869 (England)

In a few instances, the name of the state, province, or country precedes the legislative citation in the IAL. This occurs when the legislation's name could not be specifically verified or when the citation is a collection of codes for the area.

g. Court Cases

Court cases should be entered with the plaintiff and defendant cited in the same manner as in the original legal brief and not augmented. Example:

PREFERRED FORM	NON-PREFERRED FORMS
Brown v Board of Education	Brown v Topeka Board of Education Brown v Board of Education of Topeka

NOTE: In court cases, "v" (not "vs") is always used as the abbreviation of "versus."

Court case names may vary in the way they are cited in the popular literature (even to the point that the plaintiff and defendant can get reversed!). However, for indexing purposes, the original case name should continue to be used as the preferred Identifier as long as the case itself is an indexable concept in the literature.

Court decisions that may have an impact on educational practices or programs (as the Lau decision on bilingual education programs) should be indexed under the original court case name and not colloquially. Example:

PREFERRED FORM	NON-PREFERRED COLLOQUIALISM
Lau v Nichols	Lau Decision

h. Truncation

Names of legislation may often exceed the 50-character Identifier limitation, particularly when Title numbers, years, state names, etc., are added to the basic citation. Indexers should follow the truncation rules set forth in the general guidelines of this section. Truncation should be standardized for a specific act in such a way that all subdivisions of that act will file alphabetically in sequence. Example:

PREFERRED FORMS	NON-PREFERRED FORM
Elementary Secondary Education Act Elementary Secondary Education Act Title I	Elementary and Secondary Education Act 1965

i. Authorities

Two principal authorities helpful in verifying and standardizing legislation names are the following:

- *A Compilation of Federal Education Laws as Amended Through May 31, 1991* (House Committee on Education and Labor and Senate Committee on Human Resources). This is regularly updated.
- *Catalog of Federal Domestic Assistance* (revised annually by the Office of Management and Budget).

13. Methods/Theories (Category 15)

This category contains the names of a wide variety of methods, techniques, procedures, theories, standards, and models, both general and specific. Examples are:

DACUM Process
Developmental Interdependence Hypothesis
Kernel Method
Planning Programming Budgeting System
Rasch Model
Rehearsal Strategies

Caution should be exercised in creating Identifiers in this category when the name of the method, theory, etc., begins with the name of the author of the document being indexed. Unless the author is very well known, it may be better to index by the subject matter of the method. The indexer could then choose to also index the name of the author, or to not index the name and to let the searcher coordinate the Descriptors/Identifiers with the Author field. Example:

CONCEPT	POSSIBLE INDEXING	
Smith's Theory of Educational Counseling	DESC_	Educational Counseling; Counseling Theories
	IDEN_	Smith (Jill A)
		OR
	Use above Descriptors alone, and let searcher check the Author Field.	

Should the method/theory or its author eventually become well enough known to be cited by others, then the name of the concept as cited can be considered for a possible new Identifier.

Coined terminology often is assigned to the Methods/Theories category. Coined names frequently appear in documents on research projects, and their use as Identifiers is discouraged except in situations where the author/researcher is well known. Conservatism in establishing such terminology will prevent a profusion of once-posted terms.

There is a conceptual overlap between the Methods/Theories category and both the Curriculum Areas and Projects/Programs categories.

14. Miscellaneous (Category 16)

This category contains a potpourri of terminology not appropriate to the other categories and not in sufficient numbers or "clumps" to form additional defined categories. The terms in this category come from such areas as athletics, philosophy, business, and literature. Many terms in this category later become Descriptors, if warranted by usage. Examples:

Autumn
Billiards
Chicano Literature
Gallup Poll
Gardening
Gatekeeper Role
New Age Thinking
Newbery Award
Noncontact Sports
Parental Leave
Shintoism
Teacher Surplus

15. Organizations/Institutions (Category 17)

This category contains the names of specific organizations of all types: government agencies, legislative bodies, foundations, school districts, professional societies, and community, educational, and industrial institutions. All names are entered as completely as space permits. Examples are:

4 H Clubs
Advisory Council on College Chemistry
American Association for Advancement of Science
American Telephone and Telegraph Company
Army
Bureau of Indian Affairs
California State Department of Education
City Colleges of Chicago IL Malcolm X College
Congress 102nd
Department of Health and Human Services
Department of Education
ERIC
ERIC Clearinghouse on Urban Education
Kellogg Foundation
Mid Continent Regional Educational Laboratory MO
National Institutes of Health
New York City Board of Education
Office of Educational Research and Improvement
Open University (Great Britain)
Social Science Education Consortium
Station WQED TV PA
Station KPFT Radio TX
Supreme Court
UNESCO
University of California Los Angeles

The creation and use of organizational names as Identifiers is governed by the following general rules:

- If an organization is the subject of a document, it is permissible to enter the organization's name as an Identifier. Examples of types of documents in which this would be true are:

Document A:	Policies of the Miami School Board
Document B:	Listings of projects funded by the Office of Educational Research and Improvement

- If an organization is the preparer, source, sponsor, or funding agent, but not the subject of the document, then it is not permissible to enter the organization's name as an Identifier. The Institution and Sponsoring Agency fields exist to capture the names of organizations having these other relationships.

- If an organization is involved both as the subject and the source of the document, then use of both the Identifier and Institution (or Sponsoring Agency) fields is permissible. An example is the document, *The National Institute of Education—Its First Five Years*, written about NIE and funded or published by NIE.

a. Geographic Designators

Different organizations in different locations may have the same basic name. For example, there are over ten "Jefferson County School Districts," over five "Saint Marys Colleges," etc. If these names were entered without geographic designation, they could not be distinguished from each other and retrieval would suffer. For this reason, all United States and Canadian organizations requiring a geographic designator must have the state or province postal style code appended, except for national Canadian organizations, which would have the modifier "Canada" appended (in parentheses). Organizations of other countries requiring a geographic designator must have the country name appended (in parentheses). Organization Identifiers with no specific geographic referents are assumed to refer to U.S. organizations.

Certain kinds of organizations, however, do not require geographic designations. The sections that follow distinguish those that do not require location information and those that do.

(1) Organizations NOT Requiring Geographic Designator

Any organization that has the name of a state or country as part of its name need not have that information repeated as part of the Identifier. Large commercial firms or not-for-profit organizations having multiple outlets or locations, agencies of the U.S. Government, and national U.S. professional associations also do not require a geographic designator. Examples:

American Association of Retired Persons
Coast Guard
Congress 102nd
Department of Education
Dow Chemical Company
Eastern Arizona College
Episcopal Church
Florida State Library
Ford Foundation
IBM Corporation
National Council of Teachers of English
*New York City Board of Education
*Oklahoma City University
Senate Subcommittee on Education
University of Maryland College Park

*NOTE: Organizations with city names that include the name of the state in which they're located, also need not carry a further geographic designator.

(2) Organizations Requiring Geographic Designator

In each of the examples in **Figure VIII-2-9**, a geographic designator is added either in order to differentiate the name from others like it or because the location adds an important dimension to the name that could bear on retrieval.

CAMPS	Camp Cuyamaca CA
CENTERS	Center for Philosophic Exchange NY East West Center HI
DAY CARE CENTERS	Casper Day Care Center WY
FOREIGN ORGANIZATIONS	Alcohol Education Centre (England) Education Corps (Iran) Federal Parliament (Yugoslavia)
HOSPITALS	Boston Childrens Hospital MA
LIBRARIES	Butte County Public Library CA East Saint Louis Public Library IL
MILITARY FACILITIES	Davis Monthan Air Force Base AZ
MUSEUMS	Baltimore Museum of Art MD
NEWSPAPERS	Chicago Daily News IL Dayton Journal Herald OH
RADIO AND TV STATIONS	Dover Educational Television Ctr (Great Britain) Station WNYC NY Station WTTW IL
RESERVATIONS	Canoncito Navajo Reservation NM Flathead Indian Reservation MT
SCHOOL DISTRICTS	Abernathy Independent School District TX Clark County School District NV
SCHOOLS/COLLEGES/UNIVERSITIES	Abraham Baldwin Agricultural College GA Academy of Pedagogical Sciences (USSR) American University DC Brock University ON Decroby School of Barcelona (Spain) Dublin College of Speech Therapy (Ireland) University of Edinburgh (Scotland)
ZOOS	Bronx Zoo NY

FIGURE VIII-2-9: Organizational Identifiers Requiring Geographic Designation

The postal style codes for the United States and Canada are displayed in **Figure VIII-2-10.**

SPECIAL NOTE ON CANADA:

Canadian organizations were originally treated just as those from other foreign countries, with the modifier "Canada" added in parentheses. However, all new Identifiers should now use the appropriate Canadian codes shown in **Figure VIII-2-10**. Of course, national Canadian organizations still require the parenthetical qualifier "Canada," to distinguish them from national U.S. organizations.

b. Associations and Societies

Educational, social, professional, cultural, or community associations and societies should be entered as completely and accurately as possible within the 50-character limitation. Indexers should follow the truncation rules set forth in the general guidelines of this section.

No association Identifier should be created without verifying wording, existence, and spelling. One useful verification source is the *Encyclopedia of Associations*. A document may refer to the American Association of Schools of Dentistry, the American Association for Dental Schools, or the Association of American Dental Schools when, in fact, the correct organization name is the American Association of Dental Schools. Indexers have the responsibility of verifying all association names before using them as Identifiers.

All rules for geographic designators, including the use of U.S. and Canadian postal codes, apply to the creation of association Identifiers. Examples:

Audio Visual Education Association of California

Future Farmers of America
NOTE: National Association

Future Farmers of America IL
NOTE: Illinois State Chapter

Southeast Council for Exceptional Children IL
NOTE: Requires postal code; "southeast," although a geographic referent, is ambiguous by itself.

c. Government Agencies

United States Federal government agencies are entered without the words "United States" preceding the Department, Agency, Bureau, Branch, Office, etc. Examples are:

Congress 101st
Department of Education
House of Representatives
Navy
Office of Educational Research and Improvement

POSTAL CODES FOR THE UNITED STATES AND CANADA

STATE	ABBREVIATION	STATE	ABBREVIATION
Alabama	AL	Ohio	OH
Alaska	AK	Oklahoma	OK
Arizona	AZ	Oregon	OR
Arkansas	AR	Pennsylvania	PA
California	CA	Rhode Island	RI
Colorado	CO	South Carolina	SC
Connecticut	CT	South Dakota	SD
Delaware	DE	Tennessee	TN
District of Columbia	DC	Texas	TX
Florida	FL	Utah	UT
Georgia	GA	Vermont	VT
Hawaii	HI	Virginia	VA
Idaho	ID	Washington	WA
Illinois	IL	West Virginia	WV
Indiana	IN	Wisconsin	WI
Iowa	IA	Wyoming	WY
Kansas	KS		
Kentucky	KY	TERRITORIES	
Louisiana	LA		
Maine	ME	Guam	GU
Maryland	MD	Puerto Rico	PR
Massachusetts	MA	Virgin Islands	VI
Michigan	MI		
Minnesota	MN	CANADA (PROVINCES)	
Mississippi	MS		
Missouri	MO	Alberta	AB
Montana	MT	British Columbia	BC
Nebraska	NE	Manitoba	MB
Nevada	NV	New Brunswick	NB
New Hampshire	NH	Newfoundland	NF
New Jersey	NJ	Northwest Territories	NT
New Mexico	NM	Nova Scotia	NS
New York	NY	Ontario	ON
North Carolina	NC	Prince Edward Island	PE
North Dakota	ND	Quebec	PQ
		Saskatchewan	SK
		Yukon Territory	YT

FIGURE VIII-2-10: Postal Codes of the United States and Canada

State (or provincial) government agencies are entered with the appropriate state (or province) name preceding the agency, e.g.:

Maryland State Department of Education
Ontario Department of Health

All other government agencies—local, municipal, county, foreign, etc.—must have some geographic designator, either within the name itself or as an appended modifier.

In the case of government agencies, it is especially important to observe the general rules and guidelines concerning organizations as subjects. A document containing enrollment statistics for Pennsylvania public schools should be indexed by the Descriptor "Public Schools" and the geographic Identifier "Pennsylvania." It should not be indexed by an organization Identifier representing the issuing agency.

The *Federal Yellow Book* (published by Monitor Publishing Company) is a principal authority for Federal agency names. The *United States Government Manual* (published by the Government Printing Office) is also a source for U.S. government names, but is not as detailed as the *Yellow Book* (e.g., the *Government Manual* has only one page describing the Department of Education—OERI is listed, but none of its subdivisions, including ERIC, appear). Authorities for state education agencies include not only the *State Yellow Book* (Monitor Publishing) but the *Directory of State Education Agencies* (published annually by the Council of Chief State School Officers).

d. Institutions of Higher Education

The names of institutions of higher education (i.e., universities, colleges, junior colleges) should be entered in natural word order and not inverted as in the ERIC *Source Directory*). Example:

PREFERRED FORM	NON-PREFERRED FORM
University of Wisconsin	Wisconsin University

Institutions with several campuses or levels should be subdivided, as appropriate. For example, the State University of New York (SUNY) system has many separately administered subdivisions, and Identifiers for some of these follow:

State University of New York
(Note: Use when entire system is subject.)

State University of New York Buffalo
State University of New York Coll at Cortland
State University of NY Agric Tech Coll Alfred

Other major university systems with many subdivisions are:

City Colleges of Chicago IL
City University of New York
University of Hawaii

Academic libraries are normally indexed by the parent institution and not entered separately.

The *Directory of Postsecondary Institutions* (Volume 1: 4-Year and 2-Year; Volume 2: Less-Than-2-Year) produced annually by the National Center for Education Statistics (NCES) is used as the authority for the names of U.S. postsecondary education institutions. Other directories frequently employ variable formats for purposes of arrangement, indexing, etc., and, because of this, should not be used for purposes of Identifier verification. The NCES directory specifically reports name changes, mergers, etc.

The *World of Learning* should be used as the authority for the names of higher education institutions outside of the United States.

All higher education institution names should be verified using the above authorities. Occasionally, in the past, indexers have inadvertently entered fictitious institution names as Identifiers, not realizing that such names were "invented" by authors for the purpose of theoretical studies.

e. K-12 Educational Institutions

School district names are usually the lowest subdivisions necessary for retrieval of K-12 institutions. Identifiers for specific elementary schools and high schools should generally not be used in favor of the name for the overall school district. The specific school names may be entered in the Abstract (or Annotation) if an indexer wishes to refer to it. With many individual public schools in the United States named after George Washington, Martin Luther King, Jr., Thomas Jefferson, etc., it is unlikely that a user would search using a specific school's name.

Various name forms exist for local public school systems, and these differ widely from state to state. Also, local systems are frequently inconsistent in how they refer to themselves (e.g., documents from the school system in New York City may carry "New York City Public Schools" on the cover and "New York City Board of Education" on the title page). *Patterson's American Education* (two volumes covering elementary and secondary schools along with hospitals, colleges, medical schools, etc.) is used to determine an "official" name. The *Directory of Public Elementary and Secondary Education Agencies* (issued annually by the National Center for Education Statistics) is also helpful in locating school districts when the municipal location is unknown.

Usually one Identifier is sufficient to represent the subject of a particular local school system. The admitted distinctions among the board of education, unified school district, public school system, etc., for one locality are generally not sufficient to justify creating separate Identifiers for each entity. Example:

PREFERRED FORM	NON-PREFERRED FORMS
Philadelphia School District PA	Philadelphia City Schools Philadelphia Public Schools Philadelphia Public School System Philadelphia Board of Education

Documents dealing with various subjects pertaining to a given public school system (e.g., students, policies, etc.) should not be indexed by the geographic Identifier unless they also deal with the community at large. Examples:

Topic:	Integration policies of Boston Public School District
Use:	Boston Public Schools MA
Do Not Use:	Massachusetts (Boston)
Topic:	Housing Patterns and school integration policies in Boston
Use:	Boston Public Schools MA and Massachusetts (Boston)

16. Personal Names (Category 18)

This category contains the names of actual (not fictional) individuals used as the subjects of documents. Fictional characters, for which there are few Identifiers, are assigned to Category 16-Miscellaneous. Methods and theories named after a person are assigned to Category 15-Methods/Theories. Examples:

Adams (Abigail)
Agathe (Saint)
Alcott (Louisa May)
Baum (L Frank)
Bloom (Benjamin S)
Byron (Lord George Gordon)
Catherine of Siena (Saint)
Champlain (Samuel de)
Chaplin (Charlie)
Chomsky (Noam)
Clarendon (Edward Hyde 1st Earl of)
Cummings (E E)
De Gaulle (Charles A)
Drake (Sir Francis)
Edward VII
Euclid
Goethe (Johann Wolfgang von)
John Paul II (Pope)
King (Martin Luther Jr)
Loyola (San Ignacio de)
Mao Zedong
Newman (Cardinal John Henry)
O Neill (Eugene)
Piaget (Jean)
Plutarch
Shakespeare (William)
Skinner (B F)

The individual's surname is entered first, with the given name, etc., normally following in parentheses. When surname and first name are the same (e.g., Chinese names), no parentheses are used. As with all Identifiers, no special characters other than parentheses should be used; initials should be separated by a space.

Use the name by which an individual is commonly identified (whether a real name, assumed name, nickname, title of nobility, or other appellation). Standard references such as the *Encyclopedia Americana* should be used to determine appropriate name forms. Examples where common usage varies from official name are as follows:

COMMON USAGE AND PREFERRED	OFFICIAL, BUT NON-PREFERRED
Carter (Jimmy)	Carter (James Earl)
Eliot (T S)	Eliot (Thomas Stearns)
Moliere	Poquelin (Jean Baptiste)
Twain (Mark)	Clemens (Samuel Langhorne)

Do not enter two individuals having the same last name as one Identifier, no matter how closely associated the two may be, e.g.:

Smith (John)
not Smith (John and Jill)
Smith (Jill)

Computer systems, software, and equipment are occasionally named after individuals, particularly after famous persons such as the Greek philosophers. It is necessary in these situations to qualify one or more of such terms in order to differentiate them and avoid the creation of homographs, e.g.:

IDENTIFIER	WHAT IS MEANT
PLATO	Computer System
Plato of Athens	Greek Philosopher
ARISTOTLE (Computer Program)	Computer System
Aristotle	Greek Philosopher

17. Projects/Programs (Category 19)

This category contains the names of specific projects, programs, studies, etc. Examples:

Chemical Education Materials Study
Community Coordinated Child Care Program
Linguistic Bibliography Project
Mobilization for Youth
National Assessment of Educational Progress
Operation SEEK
Project Search
Project Search for Preventive Approaches
Project SPACE
Right to Read
Upward Bound

"Survey" programs are included in this category, but "survey" instruments are assigned to Category 21—Tests/Testing. Examples:

Category 19: Teacher Followup Survey (NCES)
Category 21: Parenting Style Survey

a. Acronyms

The general guideline is to avoid acronyms as Identifiers wherever possible. However, in those cases where projects are most commonly known by their acronyms, e.g., Project SPACE, such names maybe used. The IAL cross-reference capability can be used to lead from spelled-out version to acronymic version (and vice versa), if appropriate. Whenever a project has both a spelled-out name and an acronym name, both should appear in the Abstract regardless of which one is selected as the Identifier.

b. Homographs

Project/program names provide many opportunities for homographs. Capitalization and spacing are sometimes the only clues that a project/program listed in the IAL may not be the same as the one dealt with in the document being indexed. Examples:

Project Out Reach
Project Outreach
Project OUTREACH

If a project/program mentioned in a given document is different in spacing or case from a project/program name in the IAL, it is dangerous to simply assume that they are the same. The indexer should either verify the identity of the name in the IAL by checking the Scope Note or examining the earlier accessions (postings), and, if different, should create a new Identifier that matches the new format found in the document, but also differs from the earlier Identifier by something other than spacing or case.

When comparing terms to see whether they are duplicated, the ERIC computer system first compresses the term by removing blanks and special characters and then converts all characters to upper case. For this reason, terms cannot be differentiated solely on the basis of spacing or case. In order to differentiate homographs, it is necessary to add characters. Two acceptable methods are:

- Adding a subject qualifier, e.g., "Project EUREKA (Electrician Training)"
- Adding a geographic/postal designator, e.g., "Project EUREKA MN"

c. Overlap with Curriculum Category

Project/program names frequently overlap with Identifiers in Category 3—Curriculum Areas. Indexers should take care to avoid duplication between these two categories.

18. Science and Technology (Category 20)

This category contains terms pertaining to the physical and earth sciences. It excludes the health/medical sciences (Category 11) and general curriculum areas covering the physical/earth sciences (Category 3). It includes mathematical concepts and technological applications of scientific knowledge. Examples:

Algae
Aquaculture
Biofuels
Biological Control
Black Holes
Cinefluorography
Coal Gasification
Constellations
Copper Chromate
Diamonds
Dry Ice
Evaporation
Factoring (Mathematics)
Floods
Quasars
Radioactivity
Reptiles
Silver Nitrate
Triangles
Venn Diagrams
Wind Erosion
Zero Population Growth

ERIC is not primarily a science and technology database and, therefore, in creating new Identifiers for this category, excessive specificity should be avoided, e.g.:

PREFERRED	NON-PREFERRED
Monkeys	Rhesus Monkeys Squirrel Monkeys

Terms in this category should be formatted similarly to Descriptors in the "Science and Technology" Descriptor Group. The principal lexicographic authority for use with this category of Identifiers is the *SPINES Thesaurus*, 1988 edition (UNESCO).

19. Tests/Testing (Category 21)

This category contains the names of specific tests, general test batteries, statistical terms related to testing, and various concepts related to inventories, searches, samples, survey instruments, measurement, and evaluation. Examples:

ACT Assessment
Bender Gestalt Test
College and University Environmental Scales
Edwards Personal Preference Schedule
General Aptitude Test Battery
Iowa Tests of Basic Skills
Minnesota Multiphasic Personality Inventory
Raven Progressive Matrices
School and College Ability Tests
Stanford Achievement Tests
Watson Glaser Critical Thinking Appraisal

The authorities used for the names of most published tests are Buros' *Mental Measurements Yearbook* and the online *Educational Testing Service Test Collection* Database (BRS File ETSF). Tests that cannot be verified in these authorities (usually unpublished or research instruments not widely disseminated) should be entered as formally cited in the document being indexed.

Test names are generally established as Identifiers according to one of two patterns:

- the test name starts with the name of its designer or creator; or
- the test name must be modified by the name of its designer or creator in order to be clearly differentiated from other similarly named tests.

Examples are:

TEST NAMES BEGINNING WITH NAME OF DESIGNER/CREATOR	TEST NAMES QUALIFIED WITH NAME OF DESIGNER/CREATOR
Gates MacGinitie Reading Tests	Adjective Check List (Gough and Heilbrun)
Harvard Project Physics Achievement Test	Behavior Prediction Test (Morrison)

Test names should not be indexed if they are incidental to the research being reported. For example, a report in which the Gates MacGinitie Reading Tests were used to simply group subjects for some purpose should not necessarily be indexed by that test name unless the scores had some bearing on the research results.

Teacher-developed classroom tests, e.g., a series of questions on *Hamlet*, are not normally considered as appropriate Identifiers because they are unlikely to be dealt with by other documents.

20. Titles (Literary and Artistic) (Category 22)

This category contains book titles, report titles, the names of journals, monographic series, plays, poems, television shows, etc. Examples:

1984 (Title)
Abe Lincoln in Illinois
America 2000
Amerika (Miniseries)
Catcher in the Rye
Future Shock
Graduate (The)
Great Bird of Love
Hamlet
Handbook of Cooperative Education
Homecoming (Pinter)
Huckleberry Finn
Jesus Christ Superstar
Journal of Chemical Education
Miami Linguistic Readers
New York Times

Resources in Education
Roots (Haley)
Young Abe Lincoln

Reports or studies sometimes become best known by the name of the chairperson or chief investigator. If a report becomes regularly cited in this way, and not by its formal or official name, the preferred Identifier should be the name in common usage, e.g.:

PREFERRED	OFFICIAL NAME
Coleman Report	Equality of Educational Opportunity Report

An IAL cross-reference from the official name to the commonly cited name is appropriate in such instances.

Titles that are potential homographs should have a qualifier added as appropriate, e.g.:

1984 (Title)
Carrascolendas (Television Series)
Dead Birds (Title)
Science (Journal)

Common titles that have been used by more than one author should be differentiated by adding the author's name as a qualifier, e.g.:

Homecoming (Hamner)
Homecoming (Pinter)
Homecoming (Sanchez)
Homecoming (Snow)

Books in Print and the *Cumulative Book Index*, among others, can be used as authorities to verify the titles of commercially available books.

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Section IX: Data Entry

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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SUMMARY OF SIGNIFICANT RULES

1. Clearinghouses must have, at a minimum, an IBM-compatible microcomputer, XT-Level, equipped with a Hayes-compatible, 2400-baud modem, and serviced by a "private" (i.e., non-switchboard) phone line.

2. Clearinghouses must have word processing software such as WordPerfect, WordStar, or Word, and communications software, such as Procomm, Smartcom, or CrossTalk.

3. Bibliographic data for RIE, CIJE, or the EDO and ADR files, must be transmitted in ASCII format, restricted to characters in the official ERIC Character Set, and devoid of special word processing or desktop publishing characters/commands.

4. Bibliographic data for RIE, CIJE, or the EDO and ADR files should normally be transmitted online, but may, alternatively, be transmitted on diskette, if online transmission is not possible for any reason.

5. Bibliographic data for RIE and CIJE must be transmitted weekly. (Each Clearinghouse has been assigned a mutually-agreeable transmission time "window.")

6. All bibliographic data must be spell-checked before transmission to the Facility.

7. The full-text of ERIC Digests must be transmitted during the same week as the corresponding Digest resume is transmitted for RIE.

8. The standard ERIC subfield delimiter is the semicolon followed by a blank. The semicolon retains its normal punctuation function *only* in the Title, Availability, Note, and Abstract fields.

9. When transmitting bibliographic data to the Facility, never end a line with a hyphen, dash, or slash. The ERIC computer system assumes a space between the end of one line and the beginning of another.

10. The Clearinghouse Accession Number (CH_) identifies the beginning of a new record and must, therefore, always be the first field in each record.

IX. DATA ENTRY

A. Introduction

Documents and journal articles acquired by the ERIC Clearinghouses are processed (cataloged, indexed, abstracted/annotated) for retrieval and use by the educational community. The bibliographic data resulting from this processing are provided by the ERIC Clearinghouses on a weekly basis to the ERIC Processing and Reference Facility, which assembles it for appearance in the printed abstract journals *Resources in Education* (RIE) and *Current Index to Journals in Education* (CIJE) and in their equivalent computerized versions.

The ERIC database is comprised of two regular bibliographic files containing records for documents and journal articles, respectively, and a third more recent and smaller file containing the full-text of brief highly concentrated ERIC Clearinghouse documents called Digests:

- ED File — ERIC *Documents* announced in *Resources in Education* (RIE);
- EJ File — ERIC *Journal Articles* announced in *Current Index to Journals in Education* (CIJE);
- EDO File — ERIC *Digests* Online—the full-text records of ERIC Digests.

In addition, a fourth computerized file, the *Acquisitions Data Report* (ADR) is maintained on a system-wide, but strictly internal basis, for purposes of duplicate checking. This file contains the titles, publication dates, and pagination of documents in various stages of processing at the Clearinghouses for RIE. Unlike the other three files, the brief ADR records are temporary. Entries remain on the ADR file for only a year. The ADR is a means for the decentralized processing components of ERIC to determine what documents are in process throughout the system and, thereby, to avoid duplication of effort. Most documents recorded in the ADR eventually become full-fledged entries in the permanent ERIC database files.

This Section of the EPM covers data entry procedures for all four of the above files.

From time to time, other data in computerized form are requested from ERIC components. These data may include reports or information needed in specific formats, such as WordPerfect, Lotus 1-2-3, etc. These requests typically emanate from Central ERIC, ACCESS ERIC, the ERIC Facility, etc. This Manual does *not* cover data entry procedures or other requirements for such *ad hoc* data requests.

This Section is restricted to the data entry *formats, conventions, and computer activities* involved in recording and transmitting bibliographic data for the ED, EJ, EDO, and ADR files. The intellectual effort involved in creating the content of each of the data fields in the permanent files is described in detail in Sections V through VIII of this *Manual*. Likewise, the intellectual effort involved in creating the temporary ADR file is discussed in detail in Section II.

Before addressing the procedures and conventions used in data entry for the various ERIC files, the hardware (equipment) and software requirements are briefly described.

B. Hardware (Equipment) and Software Requirements

1. Hardware (Equipment) Requirements

Since ERIC data must be prepared using a computer, a system-wide minimum configuration standard for hardware has been established in order to facilitate the transmission of data between ERIC components, especially between the ERIC Clearinghouses and the ERIC Processing and Reference Facility. The basic hardware and software requirements presume that ERIC components will have either a staff member or access to personnel who are knowledgeable in the installation and use of the hardware and software. It is the responsibility of the Clearinghouses to have the required hardware and software along with the personnel trained to use it. Staff at the Facility are available to assist Clearinghouse personnel in order to achieve successful file transmission between the Clearinghouse and the Facility.

ERIC components are contractually required to have, at a minimum, the following equipment:

- Microcomputer, IBM-compatible, XT-level minimum;
- Modem, Hayes-compatible, 2400 baud;
- Phone Line ("Private", i.e., non-switchboard).

a. Microcomputer, IBM-Compatible, XT-Level Minimum

A DOS-based IBM-compatible platform has an extensive availability at a wide variety of prices. Because it has become the standard for most business applications, there is also a large and growing supply of software and related products. Although data will usually be transmitted via the telephone, the configuration also allows for the exchange of data via standard diskettes (5¼" or 3½") whenever necessary. Because of the contractually-established minimum hardware configuration, all computer information or instructions conveyed throughout the network are typically DOS-based.

In recognition of the fact that the hardware in place at Clearinghouse host organizations may vary from the ERIC standard, Clearinghouses internally may choose to use other microcomputers, such as Apple, or even a minicomputer, such as a Prime, to prepare their data. However, Clearinghouses using such hardware will need to be able to convert the data to a DOS-based ASCII (American Standard Code for Information Interchange) format prior to transmission. The use of a non-standard configuration to prepare bibliographic data for the ERIC database does not excuse a Clearinghouse from the requirement to have such a minimum configuration available.

b. Modem—Hayes Compatible, 2400 Baud

A modem is a device that converts the digital signals generated by the computer's serial port to the modulated analog signals required for transmission over a telephone line and, conversely, transforms incoming analog signals to their digital equivalents. Modems are controlled using a standardized set of instructions, the most widely used being the "Hayes," named after the manufacturer whose modems have become the industry standard. The speed of transmission of the data is known as the "baud" rate. Currently, Clearinghouses should have the capability of transmitting data at 2400 baud since the cost of transmitting is reduced when less time is spent online.

c. Phone Line (Private)

Sometimes referred to as a "dedicated" or "private" or "data" line, a private phone line is simply a voice phone line (as found in private residences) that does *not* go through a switching mechanism (i.e., an 8, 9, or other code is *not* required to obtain an outside line). Switching mechanisms can interfere with data during transmission and may introduce erroneous characters or may cause loss of lines of data.

2. Software Requirements

a. Word Processing

All Clearinghouses are required to have word processing software, such as WordPerfect, Word, WordStar, etc., for use in preparing ERIC data. The software *must* have a spell-check feature which is to be used prior to the transmission of all data. In addition, the software should have a feature to allow the data to either be prepared directly in ASCII format, sometimes referred to as "DOS text" or "non-document" format, or be converted into ASCII format from a "document format." Clearinghouses working with something other than DOS-based software must still meet the requirement for spell-checking and conversion of data.

b. Communications

To facilitate the transmission of data, all Clearinghouses are required to have communications software such as Procomm, Procomm Plus, Smartcom, CrossTalk, etc.

C. General Guidelines/Rules for the Preparation and Transmission of Data

All ERIC data transmitted by Clearinghouses must adhere to the following general rules:

1. Data must be transmitted in ASCII format. Data prepared in ASCII, sometimes referred to as "non-document" or "DOS text," are devoid of commands to a printer, bold or italics commands, bullets, tabs, etc.

2. Data prepared on a word processor in "document" mode must be converted to ASCII in order to remove non-ASCII characters.

3. Data must start at position 1 at the left margin.

4. Underlining may not be used anywhere in the text, *except* as part of the field tag.

5. Line length may not exceed 80 characters including spaces. To ensure this length, margins should not be set using the "inch" setting found in desktop word processors; instead, select a "fixed spacing" setting. A right margin setting of 75 is recommended.

6. Single spacing is *always* used; do not double or triple space between lines or resumes.

7. Use a "Hard" line feed at the end of each line; that is, do not use the "wrap" or "soft return" feature found in word processing. During computer processing, the program searches for the "Hard" line feed to determine when to go to the next line. Without the proper feed, the program will drop data that exceeds the 80 character limitation.

8. Hyphens, dashes, and slashes should not end a line.

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9. Do not use more than one space between words or after punctuation such as colons or periods.
10. Do not prepare data using proportional spacing of characters.
11. Do not justify the right margin.
12. Begin each new field on a separate line.
13. Use *only* characters listed in the ERIC Character Set (see **Figure IX-1**).

D. RIE/CIJE Resumes

1. Definitions

a. Resume

A resume is a complete surrogate record for a document or journal article. A complete record consists of the descriptive bibliographic data (title, pagination, author, etc.), indexing data, and an abstract/annotation describing the item in succinct narrative form. (**Figures IX-2A-B** display completed RIE and CIJE resumes.) All new resumes submitted by the ERIC Clearinghouses are identified initially by the Clearinghouse Accession Number. The ERIC computer system considers a resume to consist of all fields following the identifying Clearinghouse Accession Number (CH_) and preceding the next CH_.

b. Field

Within these resumes are elements of data called "fields" (e.g., title, author, contract number, abstract, etc.). An ERIC resume may have up to 24 possible data fields, although not all fields are keyed by the Clearinghouse nor would all fields be appropriate for any given resume. Each field within a resume is identified by its own unique keyword. A keyword is the "tag" which indicates the beginning of a new field. Each keyword is entered in all capital letters followed by an underscore (a character the text may not have). The complete set of all possible ERIC fields, their keywords, and whether they are provided by the ERIC Clearinghouse or the ERIC Facility, are shown alphabetically in **Figure IX-3**.

Some fields are designated *mandatory*; the data for these fields *must* be present in all RIE and/or CIJE resumes. Non-mandatory fields are called "optional" and are used when the document exhibits them. In some instances the data for the mandatory fields are provided by the Clearinghouse and in others, by the Facility. If the field is mandatory for only RIE or only CIJE, it is so noted. The *mandatory* fields in the above list are designated by bold, italicized type.

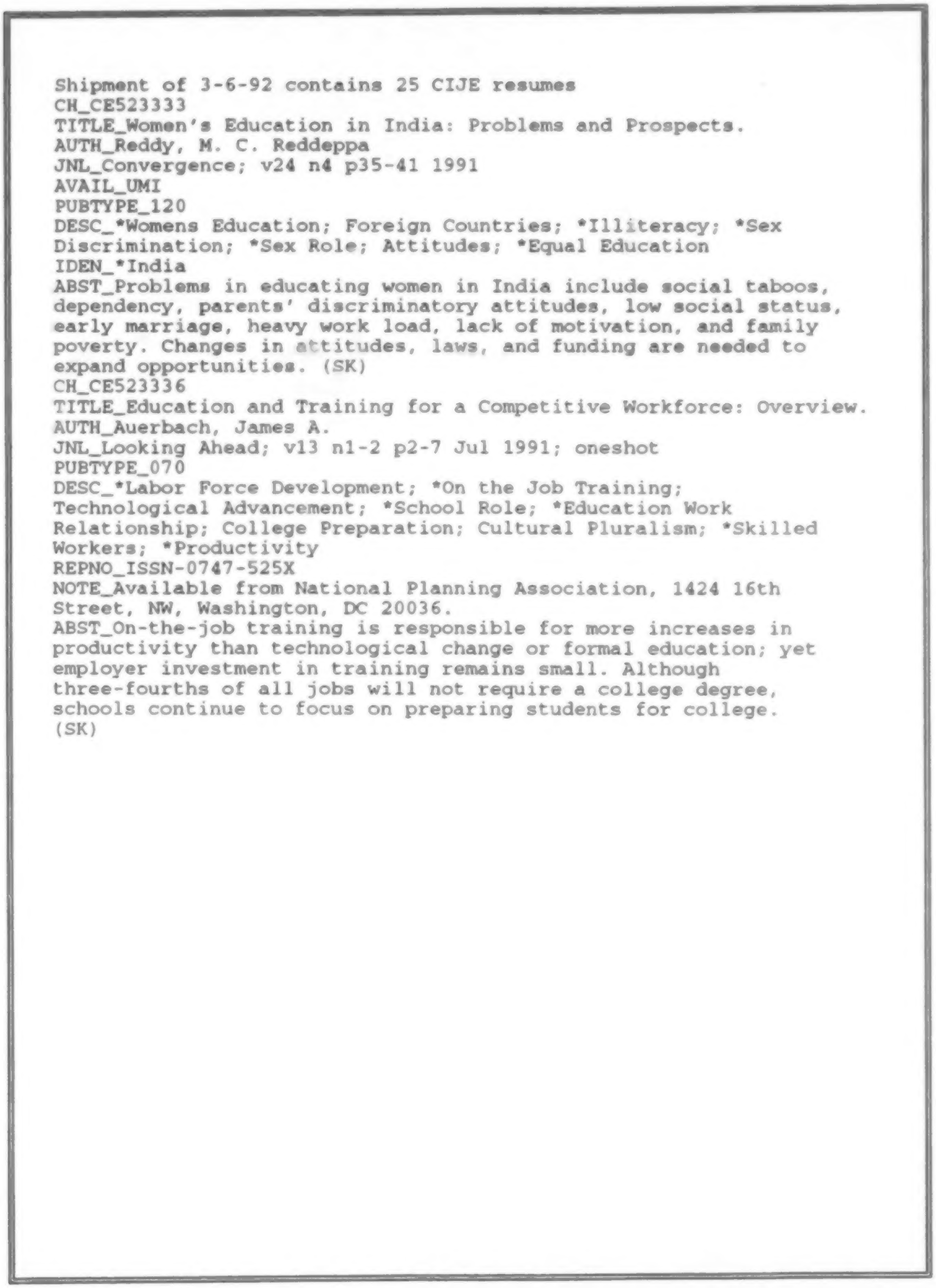
ALL ALPHABETICS - A-Z (UPPER CASE)
ALL ALPHABETICS - a-z (LOWER CASE)
NUMERICS - 0-9
SPECIAL CHARACTERS - (LISTED BELOW)

&	AMPERSAND
'	APOSTROPHE
*	ASTERISK
	BLANK SPACE
[	BRACKET (LEFT)
]	BRACKET (RIGHT)
:	COLON
,	COMMA
--	DASH (TWO HYPHENS)
$	DOLLAR SIGN
=	EQUALS
!	EXCLAMATION POINT
>	GREATER THAN
<	LESS THAN
-	HYPHEN
(	PARENTHESIS (LEFT)
)	PARENTHESIS (RIGHT)
%	PERCENT
.	PERIOD
+	PLUS SIGN
#	POUND SIGN
?	QUESTION MARK
"	QUOTATION MARK
;	SEMICOLON
/	SLASH, VIRGULE

FIGURE IX-1: **ERIC Character Set**

```
Shipment of 3-6-92 contains 33 RIE resumes
CH_CE059687
PDAT_88
LEVEL_1
TITLE_Bulletin Board Ideas.
INST_BBB06627=South Carolina State Dept. of Education, Columbia.
Office of Vocational Education.
PUBTYPE_052
GOV_State
GEO_U.S.; South Carolina
AUD_Teachers
DESC_*Home Economics; *Career Planning; Secondary Education;
Art Materials; *Bulletin Boards; Occupational Home
Economics; Student Motivation
ABST_This document consists of bulletin board ideas for high
school home economics classrooms. The first section contains 19
themes for bulletin boards. Each page contains the name of the
theme, needed materials and supplies, and an illustration of the
bulletin board. Themes include the following: home economics
occupations, motivational materials, units of instruction,
humorous materials, career planning ideas, and learning styles.
The second section contains one brochure and six posters on home
economics as a career. (NLA)
CH_CE059799
PDAT_91
LEVEL_1
TITLE_Rediscovering Our National Vision: Building Positive
Self-Esteem and a Strong Work Ethic.
INST_BBB26778=National Council on Vocational Education,
Washington, DC.
PUBTYPE_120
GOV_Federal
GEO_U.S.; District of Columbia
DESC_*Self Esteem; *Work Ethic; *Productivity; Job Satisfaction;
Self Motivation; Parent Child Relationship; Student School
Relationship; Employer Employee Relationship; Skill Development;
Elementary Secondary Education; Educational Objectives; Values;
Social Responsibility; *Entry Workers; *Family Influence; School
Role
ABST_The National Council on Vocational Education (NCVE)
determined what competencies are required for entry-level workers
and identified the educational requirements needed to train the
work force. A common theme emerged: the most desirable and
successful employees were those having a positive attitude toward
work--a strong work ethic. Positive self-esteem fosters a
positive work ethic. Individual levels of self-esteem fluctuate,
depending on one's familiarity, comfort, and training. NCVE's
Working Committee studied the role of parents, educators, and
employers and recommended how they might have a more positive
impact on young workers. They also examined ways that students
can help themselves. The committee recommended that parents and
educators find ways to reduce failure among children in their
care. The family provides the base for caring and nurturing and
is the place where personal values and social responsibility are
internalized. A comprehensive plan must integrate the resources
of family, school, workplace, and community to encourage the
highest skill, quality, and productivity in the workplace.
(Sections for parents, educators, students, and employers contain
summary steps to follow for attaining a strong work ethic.
Members of NCVE, the Work Ethic/Self-Esteem Committee members,
and 57 references are included.) (NLA)
```

FIGURE IX-2A: Completed Resumes Keyed For Online Transmission
A. RIE Resume



```
Shipment of 3-6-92 contains 25 CIJE resumes
CH_CE523333
TITLE_Women's Education in India: Problems and Prospects.
AUTH_Reddy, M. C. Reddeppa
JNL_Convergence; v24 n4 p35-41 1991
AVAIL_UMI
PUBTYPE_120
DESC_*Womens Education; Foreign Countries; *Illiteracy; *Sex
Discrimination; *Sex Role; Attitudes; *Equal Education
IDEN_*India
ABST_Problems in educating women in India include social taboos,
dependency, parents' discriminatory attitudes, low social status,
early marriage, heavy work load, lack of motivation, and family
poverty. Changes in attitudes, laws, and funding are needed to
expand opportunities. (SK)
CH_CE523336
TITLE_Education and Training for a Competitive Workforce: Overview.
AUTH_Auerbach, James A.
JNL_Looking Ahead; v13 n1-2 p2-7 Jul 1991; oneshot
PUBTYPE_070
DESC_*Labor Force Development; *On the Job Training;
Technological Advancement; *School Role; *Education Work
Relationship; College Preparation; Cultural Pluralism; *Skilled
Workers; *Productivity
REPNO_ISSN-0747-525X
NOTE_Available from National Planning Association, 1424 16th
Street, NW, Washington, DC 20036.
ABST_On-the-job training is responsible for more increases in
productivity than technological change or formal education; yet
employer investment in training remains small. Although
three-fourths of all jobs will not require a college degree,
schools continue to focus on preparing students for college.
(SK)
```

FIGURE IX-2B: **Completed Resumes Keyed For Online Transmission**
B. CIJE Resume

FIELD NAME	IDENTIFYING KEYWORD (TAG)	DATA PROVIDED BY
Abstract/Annotation	***ABST_***	***CH***
Author	AUTH_	CH
Availability (Other than EDRS)	AVAIL_	CH
Clearinghouse Accession Number	***CH_***	***CH***
Contract/Grant Number	CONT_	CH
Descriptive Note	NOTE_	CH
Descriptors	***DESC_***	***CH***
EDRS Price (RIE Only)	***PRICE_***	***FAC***
ERIC Accession Number (ED/EJ)	***ACC_***	***FAC***
Geographic Source (RIE Only)	***GEO_***	***CH***
Governmental Status	GOV_	CH
Identifiers	IDEN_	CH
Institution (Preparing Document)	INST_	CH
Issue (of Abstract Journal)	***ISS_***	***FAC***
Journal Citation (CIJE Only)	***JNL_***	***CH***
Language	***LANG_***	***CH/FAC***
Level of Availability (RIE Only)	***LEVEL_***	***CH***
Pagination (RIE Only)	***PAGE_***	***FAC/CH***
Publication Type	***PUBTYPE_***	***CH***
Publication Date	***PDAT_***	***CH***
Report Number	REPNO_	CH
Sponsoring Agency	SPON_	CH
Target Audience	AUD_	CH
Title	***TITLE_***	***CH***

FIGURE IX-3: RIE/CIJE DATA FIELDS, KEYWORDS, AND DATA PROVIDER

c. Subfield

Certain fields may be subdivided, either into different kinds of subelements or into multiple instances of the same type of data. For example, the Personal Author field may be subdivided into two personal authors, the Contract/Grant Number field into multiple contract numbers, etc.

```
AUTH_Smith, John D.; Johnson, Jane
CONT_400-80-1234; RI880045
```

The fields which may be subdivided are:

```
AUD; AUTH; CONT; DESC; GEO; IDEN; INST; JNL;
LANG; PUBTYPE; REPNO; SPON
```

NOTE: Subfields within a field are always separated or "delimited" by a semicolon followed by a blank. Except in the Title, Availability, Note, and Abstract fields, the semicolon is the standard ERIC subfield delimiter.

2. Specific Field Formats

The fields in the discussion that follows are listed and described in the order in which they should generally be entered on the resume by the Clearinghouse. (The fields that are added by the Facility staff, and/or automatically by the ERIC computer program, are listed at the end of this discussion.) The intellectual content of each of these fields is described in detail in Sections V through VIII of the EPM. Typically, following the Clearinghouse Accession Number (which always must come first), the fields containing descriptive bibliographic data such as Title, Author, Journal, etc. are keyed, followed by the fields containing indexing data (e.g. Descriptors, Identifiers, etc.), which are then followed by the lengthy Abstract field. To prevent the accidental omission of a field and to facilitate proofing by the Clearinghouse, all resumes should follow this general sequence.

NOTE: Data is always entered *immediately* after the underscore; do not leave any space between the underscore "_" and text. Use only one underscore.

a. **Clearinghouse Accession Number (CH_)**

A Clearinghouse Number consists of a two-character alphabetic prefix (each Clearinghouse is assigned one), followed by 6 numeric characters; it is assigned by the Clearinghouse, usually from a log, and must be unique to each document/article/resume entering the ERIC database. Every resume must start with a Clearinghouse Accession Number. ***It is a mandatory field and must always be the first field keyed.*** Key the number without spaces as shown below:

```
CH_CE123456
```

Of all of the fields in the resume, the Clearinghouse Accession Number is the field that it is most important to key correctly and to have match exactly with the corresponding number on the document/journal article. *Any error detected after transmission should be immediately reported to the Facility.* Ideally the Clearinghouse Accession Numbers should be proofed after keying, but before transmission, against the matching document[1] The most common errors made in this field are:

- keying the letter "O" instead of the numeric "0";
- keying the letter "l" instead of the numeric "1";
- transposing numbers;
- keying from a CIJE number range (typically 500000) instead of the proper RIE range, or vice versa;
- keying a hyphen instead of the underscore following the Clearinghouse prefix.

b. **Publication Date (PDAT_)**

Key the publication date of the document in only one of the following formats:

```
PDAT_5Sep91
PDAT_30Sep91
PDAT_Sep91
PDAT_91
PDAT_[91]
```

This is a mandatory field. No other variations (e.g., Spr, Aut, Win, Sept, Sep 5 91, 91Sep, etc.) are permissible. Do not leave blanks or supply zeros for missing information. Use only the following three-character abbreviations for the months:

```
Jan  Feb  Mar  Apr  May  Jun
Jul  Aug  Sep  Oct  Nov  Dec
```

---

[1] Except where specifically indicated, whenever "document" is used the statement also pertains to journal articles.

The bracketed date is used *only* when the publication date has been supplied by the cataloger based on indirect evidence in the document or on accompanying documentation.

c. Level of Availability (LEVEL_)

Every document is assigned a Level number indicating its availability from EDRS. *This is a mandatory field for RIE only.* Key a single digit Arabic number to reflect this availability, as shown below:

LEVEL-1	Document available from EDRS in paper copy and microfiche.
LEVEL_2	Document available from EDRS only in microfiche.
LEVEL_3	Document not available from EDRS.

The digit in the Level field should agree with the Level recorded on the Logsheet that accompanies the documents when they are shipped to the Facility (see **Section IV**).

d. Personal Author (AUTH_)

Personal authors are cataloged in accordance with the rules provided in Section V of the EPM. Entries for the Author field are exemplified by the five types below:

(1) Single Author

```
AUTH_Smith, David
AUTH_Cahn-Casden, Martha
AUTH_Rodriguez, Roberta J.
AUTH_O'Donnell, T. Donald
AUTH_Weiser, Kathleen McCabe
AUTH_Johnson, Bobbie-Sue
AUTH_Masaka, L. T.
AUTH_Thompson, Matthew P., III
AUTH_Brown, Henry K., Jr.
```

(2) Two Authors

```
AUTH_DuBarry, Samantha T.; Adams, P. James
```

(3) Three or More Authors

```
AUTH_Franklin, Gregory B.; And Others
```

(4) Editor or Editors

```
AUTH_Chinn, Carole Ann Robertson, Ed.
AUTH_Zane, Ben M., Ed.; Simon, J. T., Ed.
```

(5) Compiler or Compilers

```
AUTH_MacDonald, Arthur, Comp.
AUTH_Horning, Jenny, Comp.; Lee, Jon, Comp.
```

Hyphens and apostrophes may be used as appropriate (e.g., O'Toole, Mary-Louise). Parentheses and double quotes may not be used in the field.

Brackets "[ ]" may not be used to indicate a supplied author's name.

e. Document Title (TITLE_)

After selecting the appropriate title in accordance with EPM guidelines, key the Title (up to 500 characters) as follows:

```
TITLE_Career Education for Women.
```

This is a mandatory field. Titles must always end with a punctuation mark (period, question mark, or exclamation point). If no Title can be found and one is fabricated by the cataloger, enclose the entry in square brackets "[ ]":

```
TITLE_[Career Education for Women.]
```

For additional examples illustrating many variations, such as subtitles, edition and report statements, series titles, multi-volume titles, non-English language titles, conference proceedings, papers, Congressional hearings, etc., see the Title discussion in the EPM's Section V ("Cataloging").

f. Institution/Corporate Author (INST_)

The Institution field contains the name of the organization responsible for preparing the document. Using the guidelines in the EPM and the ERIC *Source Directory*—an authority list of more than 33,000 organization names, a cataloger selects the appropriate name(s) and its corresponding Source Code. The Code is used by the computer program to generate the "translation," i.e., the standard accepted way of recording the organization name. All Codes have a prefix consisting of three alphabetical letters followed by five numerics. The keyed entry would appear as follows:

(1) Single Institution

```
INST_BBB00000=Name of Institution
```

(2) Two or More Institutions

```
INST_BBB00000=Name of Institution;
EYV38140=International Reading Association,
Newark, Del.
```

Note that the semicolon delimiter *must* be used in this field to separate multiple individual entries.

If the institution name needed is not listed in the *Source Directory*, or if the correct Source Code cannot be identified, the Source Name should still be entered, preceded only by an equal sign:

(3) Single Institution, Code Not Located in Authority List

```
INST_=Maryland State Dept. of Education,
Annapolis. Dept. of Research and Evaluation.
```

(4) Two or More Institutions, Codes Not Located in Authority List

```
INST_=Maryland State Dept. of Education,
Annapolis. Dept. of Research and Evaluation.;
=Maryland State Dept. of Mental Health,
Annapolis.
```

This format alerts the ERIC Facility that a new Source Code may need to be created and added to the authority list.

If there are several different institutions involved, one which appears in the *Source Directory* (i.e., already has a Code established) and one which needs a new Code created, the entry format would be:

```
INST_FGK56700=National Education Association,
Washington, D. C.; =Ohio State Literacy
Council, Columbus.
```

or, in reverse order:

```
INST_=Ohio State Literacy Council, Columbus.;
FGK56700=National Education Association,
Washington, D.C.
```

The order of the names within the field is immaterial. Keep in mind that the keyword INST_ is only keyed once for the entire group of institutions.

Codes should be keyed carefully as an error will generate an incorrect name in the field (if the error happens to match an existing Code) or it will be flagged by the computer if the format is in error. To help ensure that the Code requested is the actual name desired, the Code along with the equal sign and its translation is required. When the field is processed, the computer translation as well as the name intended by the Clearinghouse will appear, thus providing a double-check.

The most common errors in this field are:

- the transposing of letters and/or numerics in the Code; and
- the use of the letters "O" and/or "l" for the numeric "0" (zero) and/or "1" (one).

Because the data in an entry for a new name will be used to establish the new Code and its translation in the authority list, the format of the proposed new name should follow as much as possible the guidelines for Institution names found in the Appendix to Section V of the EPM. The data for existing names do not need to be quite as exact since the Code used will generate the name from the *Source Directory* authority list.

g. Sponsoring Agency (SPON_)

The Sponsoring Agency is defined as the organization (other than the corporate source) that provided funds supporting the work or production of the document. The format as well as the general guidelines for this field are the same as that described for the Institution field (INST).

(1) Single Sponsoring Agency

```
SPON_EDD00001=Department of Education,
Washington, DC.
```

(2) Two or More Sponsoring Agencies

```
SPON_EDD00036=Office of Educational Research
and Improvement (ED), Washington, DC.;
BBB13494=National Science Foundation,
Washington, D.C. Directorate for Science
Education.
```

h. Contract/Grant Number (CONT_)

The Contract/Grant Number field contains specific alphanumeric identifier(s) assigned by a sponsoring agency to designate the financial support given the work or research supported in the document. It contains contract numbers, grant numbers, cooperative agreement numbers, or other procurement-related numbers. Key these numbers as follows:

(1) Single Number

```
CONT_RI88062013
CONT_G008635376
CONT_400-80-0031
```

(2) Two or More Numbers

```
CONT_RI88062013; MDR-885-0560; 400-79-0045
```

The semicolon is used as the standard subfield delimiter for this field. Blank spaces in contract numbers should be replaced with a hyphen.

i. Report Number (REPNO_)

Report Numbers should be keyed matching as closely as possible with the form appearing on the document. However, wherever a space appears in the number on the document, insert a hyphen to assure uniformity in sorting; *do not leave a blank* space. Separate multiple entries by a semicolon and a blank.

(1) Single Numbers

```
REPNO_NCES-91-118
REPNO_ISBN-0-86397-133-4
REPNO_ISSN-0282-7522
```

(2) Two or More Numbers

```
REPNO_ISBN-0-86397-133-4; ISSN-0282-722;
ETS-TR-91-34
```

If a document contains several reports, each with a separate report number but in a sequential series, the numbers should each be entered:

```
REPNO_ETC-TR-404; ETC-TR-405; ETC-TR-406
```

Do *not* use agglomerating formats, e.g.:

```
REPNO_ETC-TR-404 thru ETC-TR-407
or
REPNO_ETC-TR-404-406
```

As always, care should be taken to differentiate between the letters "O" and "I" and the numbers "0" (zero) and "1" (one); this is particularly important when recording ISBN data (i.e., all data following the prefix are numeric).

j. Publication Type (PUBTYPE_)

The Publication Type field describes the type of document in hand using a 3-digit numeric code. Up to a maximum of three codes may be assigned to this field, but three are rarely needed. The codes and their translations are shown in **Figure-IX-4**. *This is a mandatory data element for both RIE and CIJE.*

Typical entries would appear as:

(1) Single Publication Type Code

```
 PUBTYPE_052
 PUBTYPE_141
```

(2) Two or More Codes

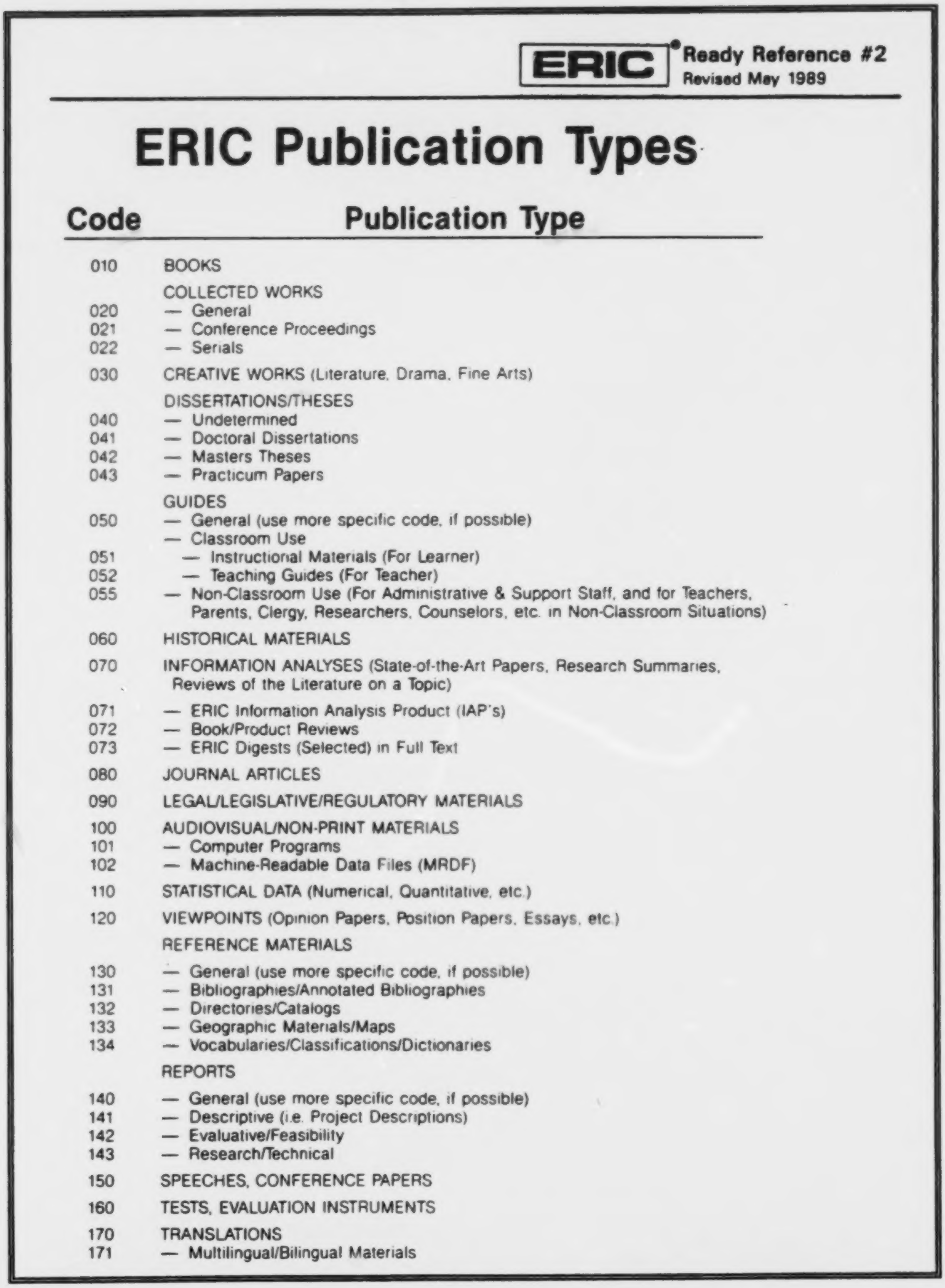
```
PUBTYPE_052; 022; 171
```

In CIJE data only, the Publication Type Code, "080", designating a journal article, is not to be keyed as it is added *automatically* by the computer to all CIJE records.

k. Descriptive Note (NOTE_)

Entries in the Note field provide miscellaneous information extending the description of the document. (Section V of the EPM provides guidelines for notes concerning conference papers, speeches, theses, related documents, analytics, marginal legibility, etc.) Typical entries would appear as follows:

```
NOTE_Paper presented at the Annual Meeting of
the National Art Education Association (30th,
Kansas City, MO, April 5-9, 1990).
```



ERIC® **Ready Reference #2**
Revised May 1989

ERIC Publication Types

Code	Publication Type
010	BOOKS
	COLLECTED WORKS
020	— General
021	— Conference Proceedings
022	— Serials
030	CREATIVE WORKS (Literature, Drama, Fine Arts)
	DISSERTATIONS/THESES
040	— Undetermined
041	— Doctoral Dissertations
042	— Masters Theses
043	— Practicum Papers
	GUIDES
050	— General (use more specific code, if possible)
	— Classroom Use
051	— Instructional Materials (For Learner)
052	— Teaching Guides (For Teacher)
055	— Non-Classroom Use (For Administrative & Support Staff, and for Teachers, Parents, Clergy, Researchers, Counselors, etc. in Non-Classroom Situations)
060	HISTORICAL MATERIALS
070	INFORMATION ANALYSES (State-of-the-Art Papers, Research Summaries, Reviews of the Literature on a Topic)
071	— ERIC Information Analysis Product (IAP's)
072	— Book/Product Reviews
073	— ERIC Digests (Selected) in Full Text
080	JOURNAL ARTICLES
090	LEGAL/LEGISLATIVE/REGULATORY MATERIALS
100	AUDIOVISUAL/NON-PRINT MATERIALS
101	— Computer Programs
102	— Machine-Readable Data Files (MRDF)
110	STATISTICAL DATA (Numerical, Quantitative, etc.)
120	VIEWPOINTS (Opinion Papers, Position Papers, Essays, etc.)
	REFERENCE MATERIALS
130	— General (use more specific code, if possible)
131	— Bibliographies/Annotated Bibliographies
132	— Directories/Catalogs
133	— Geographic Materials/Maps
134	— Vocabularies/Classifications/Dictionaries
	REPORTS
140	— General (use more specific code, if possible)
141	— Descriptive (i.e. Project Descriptions)
142	— Evaluative/Feasibility
143	— Research/Technical
150	SPEECHES, CONFERENCE PAPERS
160	TESTS, EVALUATION INSTRUMENTS
170	TRANSLATIONS
171	— Multilingual/Bilingual Materials

FIGURE IX-4: Publication Types

Some entries, such as for conference papers, have an established standardized format that should be followed (e.g., insertion of the number, location, and date of conference within parentheses following the name; use of postal abbreviations for U.S. state names) while other entries are document-dependent, with brevity and succinctness being the main criteria.

NOTE: For CIJE data only, the Note field is also used for citing publisher address and availability information for relatively obscure journals:

```
NOTE_Journal publisher: Chemical Manufacturers Association,
2501 M Street, NW, Washington, DC 20037.
```

I. Availability (AVAIL_)

This field provides information on the availability of documents from sources other than EDRS. *For documents not available from EDRS (i.e., Level 3 items), this field is mandatory.* For documents available from EDRS, the field is used to cite alternate sources of availability, when known. A typical entry would appear as:

```
AVAIL_National Catholic Educational
Association, Suite 100, 1077 30th Street, N.W.,
Washington, DC 20007-3852; (Stock No. 3533,
$15).
```

Do *not* use a leading phrase such as "Available from...," "Paper copy available from," as the computer system automatically inserts the phrase "Available from..." in front of all RIE Availability field entries.

When completed, the field should contain the following information:

- Full name of the source of the document;
- Complete address, including the street number or post office box number;
  - — For U.S. sources, use the postal abbreviations for the states;
  - — For U.S. addresses, use the 5 or 9 digit zip code;
  - — For non-U.S. addresses, the postal codes may be a combination of alphanumerics; record those exactly as found, including spaces;
- Catalog, Stock or Order Number, when appropriate;
- Do *not* use the cent (¢) sign as it is not in the ERIC Character set;
- Price of the document (in parentheses).

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Documents available from Federal agencies typically require only the agency's name, city, state, and zip code. For example:

```
AVAIL_Superintendent of Documents,
Congressional Sales Office, U.S. Government
Printing Office,  Washington, DC 20402.
```

NOTE: *For CIJE data only*, this field is restricted to:

```
AVAIL_UMI
```

which is converted automatically by the computer system to the phrase "Reprint available: UMI".

m. Journal Citation (JNL_)

If an item is a journal article (as would be announced in CIJE) or if an item is a theme issue of a journal that can be announced in RIE, the Journal Citation field is used to identify the specific journal. A typical entry would be:

```
JNL_Childhood Education; v67 n3 p194-97 Spr
1991
```

The format of the data should be the journal title (unabbreviated) in the first subfield, followed by a semicolon and a space. The second subfield contains the volume number, issue number, inclusive pagination, and date, in that order. Note:

- Numerics are always cited in Arabic numerals; do *not* use Roman numerals;
- Inclusive pagination may drop the repetitive digit for the last page;
- Abbreviate the months of the year using the standard 3-character representations:

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

- Other abbreviations used are:

volume	v	number	n
page(s)	p	special issue	spec iss
Spring	Spr	Summer	Sum
Fall	Fall	Winter	Win

This is a mandatory field for CIJE only.

n. Pagination (PAGE_)

This *mandatory* field is omitted by ERIC Clearinghouses except for Level 3 documents, for which it is mandatory. For Level 1 and 2 documents the field is added by the Facility after the documents have been paginated for EDRS filming purposes. For Level 3 documents, key the number of pages without punctuation (period, commas, or p's) as follows:

```
PAGE_1045
```

o. Language (LANG_)

The language of the document is entered in this field. Because the vast majority of documents entering the database are in English, this field has an automatic "default to English" feature when left blank (i.e., when no field is present, the computer will automatically generate "LANG_English").

For non-English or bilingual documents in which English is one of multiple languages, the field *must be keyed and is mandatory*. Examples are:

(1) English Only

Do not key field; leave blank

(2) Non-English

```
LANG_French
```

(3) Two or More Languages

```
LANG_English; Spanish
LANG_Spanish; Hmong; English
LANG_French; German
```

The languages entered in the field should correspond exactly in spelling and format to those found in the Language Authority List (see **Figure-IX-5**). This list, which contains all of the principal languages, is based upon the ERIC *Thesaurus* and *Identifier Authority List* (IAL). If a language does not appear on the Language Authority List, use the language as it appears in either the *Thesaurus* or the *IAL*.

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p. **Geographic Source (GEO_)**

The Geographic field is intended to indicate the country of origin. ***It is a mandatory field only for RIE.*** For English-speaking countries (United States, Canada, United Kingdom, Australia), which provide the bulk of ERIC documents, the field has an added subfield for the state or province level. (The lengthy "Geographic Names Authority List" appears in Section V—"Cataloging" and is not repeated here.)

Same typical entries are:

```
GEO_U.S.; Kentucky
GEO_Canada; Alberta
GEO_United Kingdom; England
GEO_Australia; Queensland
GEO_France
```

The semicolon is used as a standard subfield delimiter for this field. The abbreviation for the United States is "U.S." and is keyed with no spacing between the "U." and the "S." The entry is limited to one country only.

q. **Target Audience (AUD_)**

This data element identifies the intended educational community to which a document or article is aimed *if and when* that population is specifically identified by the document. Entries in this field are limited to the eleven defined audiences found in the "Target Audience Authority List: Administrators, Counselors, Community, Media Staff, Parents, Policymakers, Practitioners, Researchers, Students, Support Staff, and Teachers. The field uses the semicolon as a standard subfield delimiter. Examples of entries are:

(1) **One Type of Audience**

```
AUD_Teachers
```

(2) **Two or More Types of Audience**

```
AUD_Parents; Students; Teachers
```

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- Afrikaans
- Albanian
- Aleut
- Arabic
- Armenian
- Assyrian
- Athapascan
- Belizean Creole
- Bengali
- Cambodian
- Chinese
- Choctaw
- Cree
- Czech
- Danish
- Dari
- Dibabawon
- Dutch
- Edo
- English
- Ewe
- Finnish
- French
- Fulfulde
- German
- Greek
- Guarani
- Haida
- Haitian Creole
- Hausa
- Hawaiian
- Hebrew
- Hindi
- Hmong
- Hualapai
- Huichol
- Hungarian
- Hupa
- Igbo
- Ilocano
- Indonesian
- Inupiaq
- Irish
- Italian
- Japanese
- Jukun
- Kabiye
- Kalinga
- Kanuri
- Karuk
- Khowar
- Kiribati
- Kituba
- Korean
- Kpelle
- Lao
- Latin
- Malay
- Malayalam
- Mandingo
- Mandinka
- Mano
- Marathi
- Mende
- Mohawk
- Muskogee
- Navajo
- Nepali
- Norwegian
- Ojibwa
- Palauan
- Panjabi
- Passamaquoddy
- Persian
- Pima
- Polish
- Portuguese
- Pulaar
- Quechua
- Rumanian
- Russian
- Samoan
- Seminole
- Seneca
- Serbocroatian
- Setswana
- Singhalese
- Siswati
- Soninke
- Spanish
- Susu
- Swahili
- Swedish
- Tagalog
- Thai
- Tlingit
- Turkish
- Ukranian
- Vietnamese
- Wolof
- Yoruba
- Yupik
- Yurok

FIGURE IX-5: Language Authority List

(3) No Target Audience

Omit the field altogether.

One Target Audience group, "Practitioners," has subgroups (Administrators, Teachers, Counselors, Media Staff, and Support Staff). When one or more of these subgroups appears in the field, the computer will automatically insert the more generic "Practitioners" in the field.

Note that "Policymakers" is one word; do not enter in the separated form "Policy Makers."

r. Governmental Status (GOV_)

This field is intended to indicate whether the document is a publication of a governmental agency (Federal, State, County, City) in the United States and its territories or of a foreign/international agency. Only one of the following entries may be used at any one time. This field is not used in CIJE. Examples are:

```
GOV_Federal
GOV_State
GOV_Local
GOV_Foreign
Gov_International
```

s. Descriptors (DESC_)

This field contains subject index terms, as found in the *Thesaurus of ERIC Descriptors*. *This is a mandatory field and at least one major Descriptor must be entered in the field.* Follow the format and the spelling exactly as found in the *Thesaurus*. Precede major Descriptors by an asterisk, as indicated in the example below. Separate Descriptors with a semicolon and a space. No particular order is required and major Descriptors need not precede minors. Key Descriptors with the first letter of each word capitalized. Acronym-type Descriptors are entered in all upper case, e.g., FLES. Do not capitalize articles, prepositions, and conjunctions in the Descriptors unless they appear as the first word.

Spacing of Descriptors must conform precisely to that in the ERIC *Thesaurus*, e.g. "Postsecondary," *not* "Post Secondary." A sample Descriptor field would be:.

```
DESC_*Career Opportunities; *Career Planning;
*Demand Occupations; Employment Opportunities;
Females; *Working Women; Vocational Counseling;
Postsecondary Education
```

t. Identifiers

Identifiers are semi-controlled indexing terms. Terms entered in this field should either follow the format and spelling of Identifiers found in the *Identifier Authority List* (IAL) or, if a new Identifier needs to be created, should follow the format and conventions listed in Section VIII-Part 2 of the EPM.

The basic rules are:

- Identifier entries cannot exceed 50 characters (including spaces but excluding the asterisk).
- No special characters are permitted except parentheses.
- No more than two Identifiers may be asterisked as major terms.
- Separate multiple Identifiers with a semicolon and a space.

There is no requirement for any particular order. A sample Identifier field would be:

```
IDEN_*America 2000; *National Assessment of
Educational Progress;  National Tests; Illinois
```

u. Abstract/Annotation (ABST_)

The Abstract field contains a succinct, preferably informative, description of the document. *For RIE it is a mandatory field.* Except for certain kinds of documents, abstracts are limited to approximately 200 words. Annotations for CIJE are also entered in this field; they are not mandatory, but are strongly recommended. Annotations are limited to approximately 50 words.

The following rules govern the keying of Abstracts/Annotations:

- Do not end a line with a hyphen (-), slash (/), or dash (--).
- Stay within the established word limit. Abstracts that are only slightly longer will generally not be modified, but those which are considerably longer may be shortened by the Facility editors. Table-of-Contents type abstracts, which may, for example, be used to list titles and authors from a conference proceedings, may exceed the 200 word limit, but may not go beyond approximately 43 lines in length (in order not to be truncated in RIE).
- Do not use the underline, superscripts, subscripts, accent symbols, etc. (See EPM Section V for guidance on how to create substitutes for these characters.)
- Key the abstract as one complete paragraph.

3. ERIC Facility Data Entry

Following receipt at the Facility of data from the Clearinghouses, several additional fields are added automatically by the ERIC computer system. These fields are fully described in Section V of this Manual ("Cataloging") and are listed below for information purposes only:

a. Issue of Abstract Journal (ISS_)

The computer enters the date of the abstract journal issue in which the resume will be announced, e.g RIEJAN92; CIJJAN92.

b. Pagination (PAGE_)

ERIC defines "Pagination" as the number of microfiche frames necessary to photographically record the entire item. Following pagination (and frame-by-frame number stamping) of the Level 1 and Level 2 documents at the Facility, the page count is added to each resume. NOTE: Clearinghouses must provide this data for Level 3 documents, since such documents are not filmed and therefore not sent to the Facility.

c. EDRS Price (PRICE_)

The content of this field is calculated by the computer on the basis of the LEVEL and PAGE fields. Both fields must be present in order to do this.

d. ERIC Accession Number (ACC_)

The ED/EJ Accession Numbers are added sequentially to the record by the ERIC computer system, *after* all duplicates and other problem documents/articles have been removed, and just before the edited records for a particular issue (which have been sorted by Clearinghouse number) are added to the ERIC master file. ERIC final accession numbers are assigned without any gaps and for this reason cannot be determined in advance before the removals have been accomplished.

4. Data Preparation and Transmission

a. Preparation

Depending on the internal organization of an ERIC Clearinghouse, the resumes for RIE and/or CIJE are either keyed directly onto the computer by the abstractors/indexers/catalogers or are keyed by a secretary. It is recommended that data be keyed directly in ASCII format; if the data is keyed in the so-called "document" format, such as is found in desktop publishing software where various printer commands, etc., are inserted, the data must be converted to ASCII format and the printer commands deleted prior to transmission.

b. What Should Be Transmitted

The RIE/CIJE resumes transmitted should correspond with the RIE documents and CIJE logsheets to be shipped later in the same week to the Facility. It is recommended that the file transmitted to the Facility specify the number of RIE and CIJE records contained in the transmission (see **Figure-IX-2(A-B)**).

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c. **Proofing**

Clearinghouse Accession Numbers should always be proofed against the document/article accession numbers. Resumes should be arranged in numerical order by Clearinghouse Accession Number. RIE and CIJE resumes should be kept as two separate and distinct groups; do *not* intermix RIE/CIJE records. All resumes should undergo a final check to be certain that all mandatory fields are present. Resumes should be spell-checked prior to transmission.

It is recommended that Clearinghouses add the ERIC keywords to their word processing dictionary so that any errors in these fields will be detected. Keywords should be carefully checked to ensure there has been only one occurrence per resume. For example, a very common error is for a keyword such as "DESC" to be keyed twice, with the second occurrence used, in error, for the Abstract field. When a keyword is keyed twice in the same resume, the data in the first occurrence will be overlaid by the data in the second occurrence during computer processing, thereby wiping out the data in the first occurrence. If the second occurrence contains more data than that allowed by the field, the data may be truncated or discarded as "illegal" by the computer.

d. **Transmission Schedule**

On a weekly basis, Clearinghouses must transmit to the Facility resumes for both RIE and CIJE. Because of variations in telecommunication setups at the Clearinghouses, each Clearinghouse has a mutually-agreed-upon time for transmission. If a Clearinghouse, for whatever reason, must abstain from a transmission, the ERIC Facility should be contacted.

e. **Data Errors Detected after Transmission**

If a major error in a resume is detected after transmission (e.g., incorrect Clearinghouse Accession Number, wrong abstract, etc.), the Facility should be immediately contacted by phone or FAX so that the error can be corrected before the data undergoes computer processing.

f. **Data on Diskettes**

If a Clearinghouse encounters a problem in transmitting its data via telephone, the data may be submitted on a DOS-formatted diskette. The resumes should still be keyed in the same format. The diskette—either 5¼" or 3½"—should be properly labelled as to the Clearinghouse, shipping date, and contents and mailed using a mailing folder especially made for diskettes. Transmission of data diskettes is only for emergency situations and should not be done on a regular basis.

g. **Retention of Data**

Clearinghouses should retain copies of the transmitted files containing RIE/CIJE resumes until the resumes appear in RIE and/or CIJE—approximately three months after transmission. Because data can become garbled in transmission or can be lost, sometimes the Facility must request that data be retransmitted. Failure to retain the files might require a Clearinghouse to reconstruct or rekey the data.

E. ERIC Digests: Preparation of Digest Full-Text Data

ERIC Clearinghouses annually produce approximately 160 ERIC Digests. Typically, these Digests are brief, two-page discussions of "hot" topics in the field of education. Digests have been published in printed form for many years, and now (through 1991) number more than 1200. Digests have been regularly processed and announced in RIE. Beginning in 1988, the full-text, i.e., the entire contents, of Digests has been made available to users via the online vendors. (That is, a searcher can retrieve not only the citation for the Digest, but can also print out the actual text of the Digest itself.)

Prior to 1991, Digest full-text data were submitted in computerized format by the Clearinghouses on a non-systematic basis. Beginning with 1991, the full-text of all ERIC Digests is transmitted by the Clearinghouses at the same time as the corresponding resume is transmitted for RIE. The full-text records are retained as a separate file (the "EDO" file) at the ERIC Facility and made available on demand to tape subscribers. (Because the ERIC Digests tend to be published in clumps, generally near the end of year, the Digest full-text updates are currently being done on an annual basis. If the publication of ERIC Digests become more regularly spaced throughout the year, the full-text updates may be done on a more frequent basis.)

Unlike longer, more substantive Clearinghouse monographs, that may be produced using standard typesetting or commercial photocomposition methods, Digests are often produced using desktop word processing software that permits the Digest data to be easily converted to a format that can be added to the ED portion of the ERIC database. Therefore, the instructions that follow presume the existence of the full-text of the Digest in a computerized form which can be easily converted. All ERIC Digests are normally to be made available as full-text records. In instances where the word processing data cannot be converted, the full-text record may have to be created by re-keying. If an optical scanner is available, a printed copy may be scanned and the resultant text used for the full-text data.

1. Data Input Requirements

The Digest full-text input must be in ASCII format and prepared according to the same instructions that the Clearinghouses use for their RIE/CIJE input (see **EPM Section IX.C**).

2. Format

Because the full-text of a Digest is appended to its corresponding resume record on the ERIC Master File, only the actual narrative content of the Digest comprises the full-text. In other words, data such as the Title, Author, Publication Date, etc., are not made part of the full-text record because they are *already there* in field-by-field form in the resume part of the record. (See **Figures IX-6(A-B)** for an example of a published Digest and an example of the full-text data for that same Digest.)

Each full-text record *must* at a minimum contain the following field tags (Keywords): CH_ and TEXT_. Most records will also need to use the keyword "REFS_" to introduce the References section. The infrequent Digest containing structured tables may need to use the TABLE_ keyword. *No other field tags are to be used for Digests.*

a. Accession Number (CH_)

Example: `CH_CE123456`

This field identifies the beginning of a record and *must* be present. As with RIE/CIJE data, the number is entered without blank spaces. This Clearinghouse Accession Number must correspond with the Clearinghouse Accession Number used for the Digest's resume in RIE.

NOTE: In the rare instance of a full-text record not transmitted concurrently with its RIE record, but transmitted *after* the record has been processed with an ED Number, then the entry should begin with:

```
ACC_ED123456
```

and the Accession Number of the Clearinghouse should be omitted.

b. Full-Text of the Digest (TEXT_)

The text of the Digest must be identified by the field tag "TEXT_". The text should correspond exactly to that found in the published Digest (i.e., don't abridge and don't expand). However, minor corrections to faulty text in the published version can be made.

The text should appear essentially as it looks on the original, while still staying within the limitations imposed by ASCII characters, that is, bold, italics, underlining, bullets, tabs, commands to the printer, etc., that cannot be represented on the ERIC file, must be converted or eliminated. The following rules should provide the necessary guidance:

- ***Margins***

  Left margin must be at position 1 (as with RIE/CIJE data). If original Digest has different margins, they must be changed.

- ***Headers***

  Place headers on separate lines. Key headers in all uppercase. Use standard indention (minimum 5 spaces), but do not use the tab key to indent; if two lines are needed for a header, indent the second line as well. If a header is used as the first line of a full-text record, it should be in all uppercase, immediately after the TEXT_ keyword.

- ***Line Spacing***

  Use single-space only between paragraphs, lists, etc.

- ***Paragraph Indentions***

  Each new paragraph must begin with at least a five-space indention; do not use the Tab key. Without the indentions, the text would be run-on.

- ***Line Returns***

  Each line must be ended with a "Hard Return." Do *not* use the "Wrap" or "Soft Return" feature.

- ***Right Justification***

  Right justification, used perhaps to produce an even margin in a published form, must be removed.

- ***Bullets***

  Convert bullets to asterisks, hyphens, or numbers. Lists may be indented, if that will make them easier to read, even if they were not indented in the original.

- ***Underlining and Italics***

  The underline character and italics may not be used in Digest text. Any underlining and italics used in the published version must be converted to quotation marks. (Underlining also may not be used to indicate the repeat of an author in the bibliography section (REFS field) or to separate data within the Digest.)

- ***Desktop Publishing Commands***

  All desktop commands—tabs, printer commands, etc.—must be removed. The accent mark used for the left single-quote must be changed to an apostrophe, since the accent mark is not a valid ERIC character.

- ***Charts, Tables, Graphs, etc.***

  Charts and tables containing alphabetic and/or numeric text in columns may be entered in a separate field "TABLE_", at the end of the Digest record. Vertical lines, horizontal lines, etc., which may have appeared in the print version, must be removed. Spaces between columns of numbers must be represented by blanks. As with regular RIE/CIJE data, superscripts, subscripts, underscores, etc., must be removed or converted.

  Specialized graphs (bar, pie, line, etc.) cannot be handled by this technique and must be converted to paragraph form or otherwise summarized in the text.

- ***Forced Lines, Left Justified***

  If a new line, left justified, is desired, e.g., a list, an address, etc., portions of which are to be on separate lines, a special character, "@@" must be inserted at position 1 just before the start of the data, to identify the need for a new line.

Example:

```
@@ERIC Processing and Reference Facility
@@1301 Piccard Drive, Suite 300
@@Rockville, MD 20850-4305
@@Send self-addressed envelope...
```

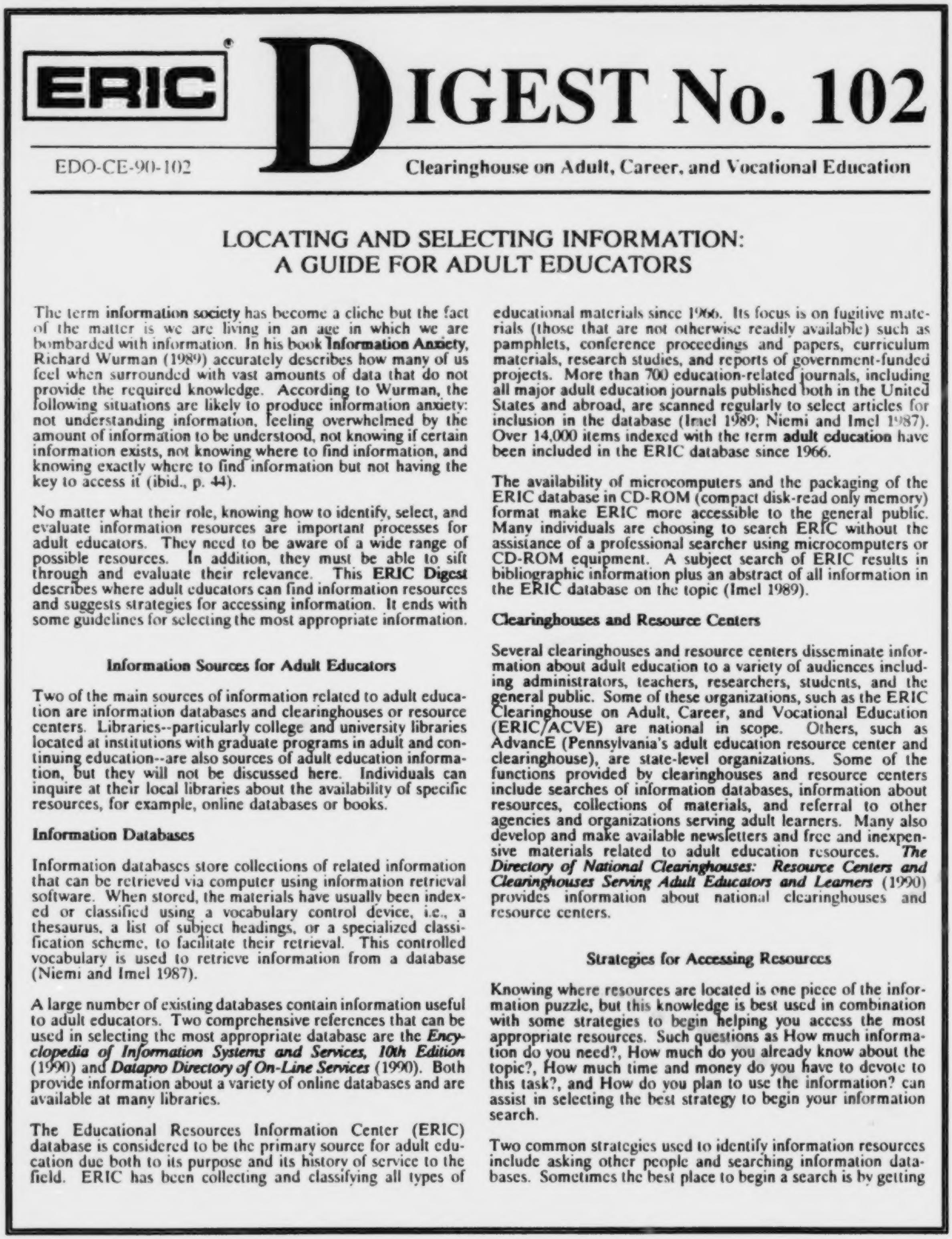
The EDO program will force a new line whenever the "@@" appears. Without the @@ symbol, the line might read:

Example:

```
ERIC Processing and Reference
Facility 1301 Piccard Drive, Suite
300 Rockville, MD 20850-4305 Send
self-addressed envelope...
```

c. References/Citations (REFS_)

Because certain large Digests in their entirety exceed field size limitations for the TEXT field, it is necessary that trailing "References," "Bibliography," "Additional Readings," "For Further Reading," etc., be identified by the separate field tag REFS_. Data in this field will be appended to the end of the TEXT field on tapes going to vendors. In addition, since Clearinghouses use different bibliographic citation styles, data in the REFS field will *not* be processed in the same way by the computer as it is in the full-text record. For example, titles which are uppercased in the bibliographic citation and indented will not be processed as the headers are in the full-text, i.e., centered, but will remain as entered.



ERIC® DIGEST No. 102

EDO-CE-90-102

Clearinghouse on Adult, Career, and Vocational Education

LOCATING AND SELECTING INFORMATION: A GUIDE FOR ADULT EDUCATORS

The term **information society** has become a cliche but the fact of the matter is we are living in an age in which we are bombarded with information. In his book **Information Anxiety**, Richard Wurman (1989) accurately describes how many of us feel when surrounded with vast amounts of data that do not provide the required knowledge. According to Wurman, the following situations are likely to produce information anxiety: not understanding information, feeling overwhelmed by the amount of information to be understood, not knowing if certain information exists, not knowing where to find information, and knowing exactly where to find information but not having the key to access it (ibid., p. 44).

No matter what their role, knowing how to identify, select, and evaluate information resources are important processes for adult educators. They need to be aware of a wide range of possible resources. In addition, they must be able to sift through and evaluate their relevance. This **ERIC Digest** describes where adult educators can find information resources and suggests strategies for accessing information. It ends with some guidelines for selecting the most appropriate information.

Information Sources for Adult Educators

Two of the main sources of information related to adult education are information databases and clearinghouses or resource centers. Libraries--particularly college and university libraries located at institutions with graduate programs in adult and continuing education--are also sources of adult education information, but they will not be discussed here. Individuals can inquire at their local libraries about the availability of specific resources, for example, online databases or books.

Information Databases

Information databases store collections of related information that can be retrieved via computer using information retrieval software. When stored, the materials have usually been indexed or classified using a vocabulary control device, i.e., a thesaurus, a list of subject headings, or a specialized classification scheme, to facilitate their retrieval. This controlled vocabulary is used to retrieve information from a database (Niemi and Imel 1987).

A large number of existing databases contain information useful to adult educators. Two comprehensive references that can be used in selecting the most appropriate database are the ***Encyclopedia of Information Systems and Services, 10th Edition*** (1990) and ***Datapro Directory of On-Line Services*** (1990). Both provide information about a variety of online databases and are available at many libraries.

The Educational Resources Information Center (ERIC) database is considered to be the primary source for adult education due both to its purpose and its history of service to the field. ERIC has been collecting and classifying all types of educational materials since 1966. Its focus is on fugitive materials (those that are not otherwise readily available) such as pamphlets, conference proceedings and papers, curriculum materials, research studies, and reports of government-funded projects. More than 700 education-related journals, including all major adult education journals published both in the United States and abroad, are scanned regularly to select articles for inclusion in the database (Imel 1989; Niemi and Imel 1987). Over 14,000 items indexed with the term **adult education** have been included in the ERIC database since 1966.

The availability of microcomputers and the packaging of the ERIC database in CD-ROM (compact disk-read only memory) format make ERIC more accessible to the general public. Many individuals are choosing to search ERIC without the assistance of a professional searcher using microcomputers or CD-ROM equipment. A subject search of ERIC results in bibliographic information plus an abstract of all information in the ERIC database on the topic (Imel 1989).

Clearinghouses and Resource Centers

Several clearinghouses and resource centers disseminate information about adult education to a variety of audiences including administrators, teachers, researchers, students, and the general public. Some of these organizations, such as the ERIC Clearinghouse on Adult, Career, and Vocational Education (ERIC/ACVE) are national in scope. Others, such as AdvancE (Pennsylvania's adult education resource center and clearinghouse), are state-level organizations. Some of the functions provided by clearinghouses and resource centers include searches of information databases, information about resources, collections of materials, and referral to other agencies and organizations serving adult learners. Many also develop and make available newsletters and free and inexpensive materials related to adult education resources. ***The Directory of National Clearinghouses: Resource Centers and Clearinghouses Serving Adult Educators and Learners*** (1990) provides information about national clearinghouses and resource centers.

Strategies for Accessing Resources

Knowing where resources are located is one piece of the information puzzle, but this knowledge is best used in combination with some strategies to begin helping you access the most appropriate resources. Such questions as How much information do you need?, How much do you already know about the topic?, How much time and money do you have to devote to this task?, and How do you plan to use the information? can assist in selecting the best strategy to begin your information search.

Two common strategies used to identify information resources include asking other people and searching information databases. Sometimes the best place to begin a search is by getting

FIGURE IX-6(A): Published ERIC Digest

in touch with someone who is familiar with the area. This strategy may be particularly useful if you know little or nothing about the topic. Most adult educators are more than happy to share information about their work, including key information sources. Adult education resource center and clearinghouse personnel are frequently able to help you identify information sources. These individuals work with adult education information resources on a daily basis and are knowledgeable about new materials. They may be able to refer you to other sources of information as well.

A second strategy for locating information is by searching information databases. Most information databases can be accessed both manually and by computer, and many are available in CD-ROM format.

Manual searching. Manual searching refers to the process of using print indexes or catalogs to identify resources. Although not as efficient as computer searching, it may be more effective, especially if you only need a small amount of material or if you are unfamiliar with the topic. A manual search permits the luxury of browsing that the cost of computer searching prohibits. The tradeoff, however, is the cost of the time devoted to the task. Another drawback to manual searching is the fact that you can only search under one subject heading at a time.

Computer searching. Computer searching can be both efficient and effective, provided you know what you are looking for. Computer searching is the most efficient means of retrieving a large amount of information on a topic because it allows you to combine two or more subjects. It can also permit you to limit your search to certain types of material such as research, project descriptions, and curricula. If you have not sufficiently focused your topic, however, it can result in irrelevant material. If you are unfamiliar with the database you wish to search, it is best to consult a professional searcher before attempting a search.

CD-ROM searching. Searching using CD-ROM combines many of the best features of both manual and computer searching. Because there are no online charges being incurred, it can provide the luxury of browsing at the same time it provides the efficiency of computer searching. Because of the time needed to print out citations, CD-ROM is not the best medium for large searches. Also, the demands placed on many CD-ROM stations available to the public may mean limited access.

Selecting Information Sources

Selecting potential sources of information once they have been identified is another step in process. How selective you wish to be may depend on a number of factors such as the amount of material uncovered in your search, the use to which you intend to put the information, and the availability of the sources.

Barrows (1987) suggests weighing the advantages and disadvantages of each source in terms of the following:

- **Availability.** Is the source obtainable?
- **Accessibility.** How easy is it to acquire the source?
- **Time.** How long will it take to get it?
- **Effort.** How much trouble will it be to get it?
- **Cost.** How much will it cost?

Although important in terms of the feasibility of acquiring resources, these criteria have nothing to do with evaluating the substantive nature of the resource. The following guidelines can be used to evaluate and select resources based on their content:

- **Authority of source.** Is the author an established leader in the field? Is it published by an organization that is known for contributing to the field?
- **Timeliness.** Is the information current and up to date? Is it based on current references?
- **Relevance.** Does the source deal with the topic in a contemporary manner? Does the source contain the type of information you need?
- **Depth.** Is the topic treated in sufficient detail to be of use?
- **Accuracy.** Based on what you already know about the topic, is the information correct and reliable?
- **Replicability.** If you are planning to use the material for the purpose of replication, does the source contain information that can be used in other settings?

These criteria should be considered guidelines, not hard and fast rules, when selecting sources. Depending on how you will be using the information, some may be more important than others. For example, if a source meets all the other criteria, the fact that you are unfamiliar with the author or the producer may be irrelevant.

References

Barrows, H. S. "Learning Management in the Context of Small Group Problem-Based Learning." In *Learning Management: Emerging Directions for Learning to Learn in the Workplace*. Information Series no. 320, edited by M. Cheren. Columbus: ERIC Clearinghouse on Adult, Career, and Vocational Education, 1987. (ERIC Document Reproduction Service No. ED 290 930).

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Imel, S. "The Field's Literature and Information Sources." In *Handbook of Adult and Continuing Education*, edited by S. B. Merriam and P. M. Cunningham. San Francisco: Jossey-Bass, 1989.

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This ERIC Digest was developed in 1990 by Susan Imel with funding from the Office of Educational Research and Improvement, U.S. Department of Education under Contract No. RI88062005. The opinions expressed in this report do not necessarily reflect the position or policies of OERI or the Department of Education. Digests are in the public domain and may be freely reproduced.

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SAMPLE OF DIGEST FULL-TEXT KEYED FOR EDO FILE

```
CH_CE123456
TEXT_The term "information society" has become a cliche but the
fact of the matter is we are living in an age in which we are
bombarded with information. In his book INFORMATION ANXIETY,
Richard Wurman (1989) accurately describes how many of us feel
when surrounded with vast amounts of data that do not provide the
required knowledge. According to Wurman, the following
situations are likely to produce information anxiety: not
understanding information, feeling overwhelmed by the amount of
information to be understood, not knowing if certain information
exists, not knowing where to find information, and knowing
exactly where to find information but not having the key to
access it (ibid., p. 44).
     No matter what their role, knowing how to identify, select,
and evaluate information resources are important processes for
adult educators. They need to be aware of a wide range of
possible resources. In addition, they must be able to sift
through and evaluate their relevance. This ERIC Digest describes
where adult educators can find information resources and suggests
strategies for accessing information. It ends with some
guidelines for selecting the most appropriate information.
     INFORMATION SOURCES FOR ADULT EDUCATORS
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education are information databases and clearinghouses or
resource centers. Libraries--particularly college and university
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and continuing education--are also sources of adult education
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can inquire at their local libraries about the availability of
specific resources, for example, online databases or books.
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information that can be retrieved via computer using information
retrieval software. When stored, the materials have usually been
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thesaurus, a list of subject headings, or a specialized
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controlled vocabulary is used to retrieve information from a
database (Niemi and Imel 1987).
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ERIC has been collecting and classifying all types of educational
materials since 1966. Its focus is on fugitive materials (those
that are not otherwise readily available) such as pamphlets,
conference proceedings and papers, curriculum materials, research
```

FIGURE IX-6(B): Sample of Digest Full-Text Keyed for EDO Files

studies, and reports of government-funded projects. More than 700 education-related journals, including all major adult education journals published both in the United States and abroad, are scanned regularly to select articles for inclusion in the database (Imel 1989; Niemi and Imel 1987). Over 14,000 items indexed with the term "adult education" have been included in the ERIC database since 1966.

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Two common strategies used to identify information resources include asking other people and searching information databases. Sometimes the best place to begin a search is by getting in touch with someone who is familiar with the area. This strategy may be particularly useful if you know little or nothing about the topic. Most adult educators are more than happy to share information about their work, including key information sources. Adult education resource center and clearinghouse personnel are frequently able to help you identify information sources. These individuals work with adult education information resources on a daily basis and are knowledgeable about new materials. They may be able to refer you to other sources of information as well.

A second strategy for locating information is by searching information databases. Most information databases can be accessed both manually and by computer, and many are available in CD-ROM format.

Manual searching. Manual searching refers to the process of using print indexes or catalogs to identify resources. Although not as efficient as computer searching, it may be more effective, especially if you only need a small amount of material or if you are unfamiliar with the topic. A manual search permits the luxury of browsing that the cost of computer searching prohibits. The tradeoff, however, is the cost of the time devoted to the task. Another drawback to manual searching is the fact that you can only search under one subject heading at a time.

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CD-ROM searching. Searching using CD-ROM combines many of the best features of both manual and computer searching. Because there are no online charges being incurred, it can provide the luxury of browsing at the same time it provides the efficiency of computer searching. Because of the time needed to print out citations, CD-ROM is not the best medium for large searches. Also, the demands placed on many CD-ROM stations available to the public may mean limited access.

SELECTING INFORMATION SOURCES

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Barrows (1987) suggests weighing the advantages and disadvantages of each source in terms of the following:

001. Availability. Is the source obtainable?
002. Accessibility. How easy is it to acquire the source?
003. Time. How long will it take to get it?
004. Effort. How much trouble will it be to get it?
005. Cost. How much will it cost?

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003. Relevance. Does the source deal with the topic in a contemporary manner? Does the source contain the type of information you need?
004. Depth. Is the topic treated in sufficient detail to be of use?
005. Accuracy. Based on what you already know about the topic, is the information correct and reliable?
006. Replicability. If you are planning to use the material for the purpose of replication, does the source contain information that can be used in other settings?

These criteria should be considered guidelines, not hard and fast rules, when selecting sources. Depending on how you will be using the information, some may be more important than others. For example, if a source meets all the other criteria, the fact that you are unfamiliar with the author or the producer may be irrelevant.

REFS_REFERENCES

Barrows, H. S. "Learning Management in the Context of Small Group Problem-Based Learning." In Learning Management: Emerging Directions for Learning To Learn in the Workplace. Information Series No. 320, edited by M. Cheren. Columbus: ERIC Clearinghouse on Adult, Career, and Vocational Education, 1987. (ERIC Document Reproduction Service No. ED 290 930).

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Datapro Directory of On-Line Services. Delray, NJ: Datapro Research Corporation, 1990.

Encyclopedia of Information Systems and Services, 10th Edition. Detroit: Gale Research Corporation, 1990.

Imel, S. "The Field's Literature and Information Sources." In Handbook of Adult and Continuing Education, edited by S. B. Merriam and P. M. Cunningham. San Francisco: Jossey-Bass, 1989.

Niemi, J. A., and Imel, S. "Information Retrieval." In Materials and Methods in Adult and Continuing Education, edited by C. Klevins. Los Angeles: Klevens Publications, 1987.

Wurman, R. Information Anxiety. New York: Doubleday, 1989.

This ERIC Digest was developed in 1990 by Susan Imel with funding from the Office of Educational Research and Improvement, U.S. Department of Education under Contract No. RI88062005. The opinions expressed in this report do not necessarily reflect the position or policies of OERI or the Department of Education. Digests are in the public domain and may be freely reproduced.

Do *not* use REFS_ more than once in a record, as the second occurrence will overlay the first use. If the Digest contains other sections, such as "Resources," in addition to a References Section, the header for the additional section should be processed as part of the REFS_ section, as in the example below:

Example:

```
REFS_REFERENCES
     Adams, B. New Educational Ideas...,
Washington, DC. 1990.
     Smith, W. Education Is a Good Thing;
Harcourt Brace, New York, NY. 1991.
     ----
@@RESOURCES
     Office of Educational Research and
Improvement (ED), What Works, Washington, DC.
1989.
     Wisconsin Educational Research Center,
Education Programs, Madison, WI. 1991.
```

The following rules pertain to the REFS_ section:

- ***Header*** - Key in all uppercase.
- ***Citation*** - Each citation should begin on a separate line, indented 5 spaces, with succeeding lines left justified.
- ***Style/Format*** - Within a given Digest, citations should be in a *consistent style* as to spacing, upper casing of titles, spacing of initials, etc. For readability, the entire title should not be in all uppercase. ED Numbers should always be cited with "ED" before the number and not as "ERIC Document Number 300 000."

Disclaimer data and other concluding information, such as Digest author information, should be keyed at the end of the References section.

3. Conversion of Digest Text (That Has Been Word Processed) to ASCII Format

Since the full-text of most Digests has been produced using various word processing systems (such as WordPerfect), that same data can be used for transmission of the Digest to the Facility, provided it is: (1) properly converted to ASCII; and, (2) modified to meet the specifications discussed above.

Conversion-to-ASCII procedures are generally available on most word processing systems. After completing the conversion, but before attempting to transmit the data online (or on a diskette) to the Facility, the Clearinghouse should check the entire record to ensure that no extraneous word processing characters still exist. Pay particular attention to the proper conversion of hyphens and bullets. Delete extra spaces. Be certain that line length does not exceed 80 characters (75 preferred)—if the data were prepared using desktop settings (which are typically in inches), the printed data will fit on the page, but in actuality may exceed the 80 characters limit.

One way to determine whether all word processing characters (underlining, special formatting symbols such as centering, fonts, etc.) have been removed is to call up the file using DOS commands for "Type" or "Print," as follows:

```
EXAMPLE:                    If DOS is on the C Drive:

Key    C>Type filexyz             then press the Enter
                                  key

                          OR

Key    C>Print filexyz      then press the Enter key

EXAMPLE:                    If DOS is on the A Drive

Key    A>Type filexyz             then press the Enter
                                  key

                          OR

Key    A>Print filexyz      then press the Enter key
```

A text that is improperly converted, that contains numerous invalid characters and hyphens at the end of the lines, and that has improper line lengths may not be processed by the Facility, and the Clearinghouse may be asked to rework and retransmit the data.

4. Transmission of Full-Text

The full-text Digest record should be transmitted online along with the weekly RIE/CIJE data. If online transmission is not possible for any reason, the records may be placed on an IBM-compatible 5-1/4" or 3-1/2" diskette (data in ASCII format) and shipped to the Facility, separately or with the regular shipment of documents. Online transmission of each separate file should be preceded by a short message announcing "Digest Full-Text (3 items)." Do *not* append the full-text of the Digest to the resume data intended for RIE. Keep the data for the two files separate.

If a diskette is mailed, the records should be processed in numeric order by accession number and entered as *one* file. For example, three Digests by CG might all be on the diskette as one file called "CGDIG501." When file CGDIG501 is called up on the computer at the Facility, the full-text of the three Digests will then all be under that one file name. Do not list each Digest individually.

Diskettes may be enclosed with the regular document shipment; however, the diskette should be placed in a mailing holder designed for protecting diskettes. The diskette as well as its mailing holder should be labelled with the Clearinghouse name, EDO, and the date of shipment. The label for the diskette should be affixed to it; i.e., do not put the label on the diskette's envelope and leave the diskette itself unlabelled. (As an added precaution, the existence of a diskette should be noted on the logsheet.)

Insofar as possible, Digests should be processed regularly throughout the year so that an even flow can be maintained.

5. Shipment of ERIC Digests for EDO File

A copy of the printed version of an ERIC Digest should be shipped the same week as the full-text record is transmitted for the EDO file. This EDO-related copy is in addition to the one shipped for routine processing in RIE. The printed version is used by the editors at the Facility to proof the full-text to ensure that no data have been lost in transmission. Do *not* ship merely a copy of the raw data (a listing of the file printed after conversion of data).

The printed version of the Digest should be prepared and shipped for the EDO file in the following manner:

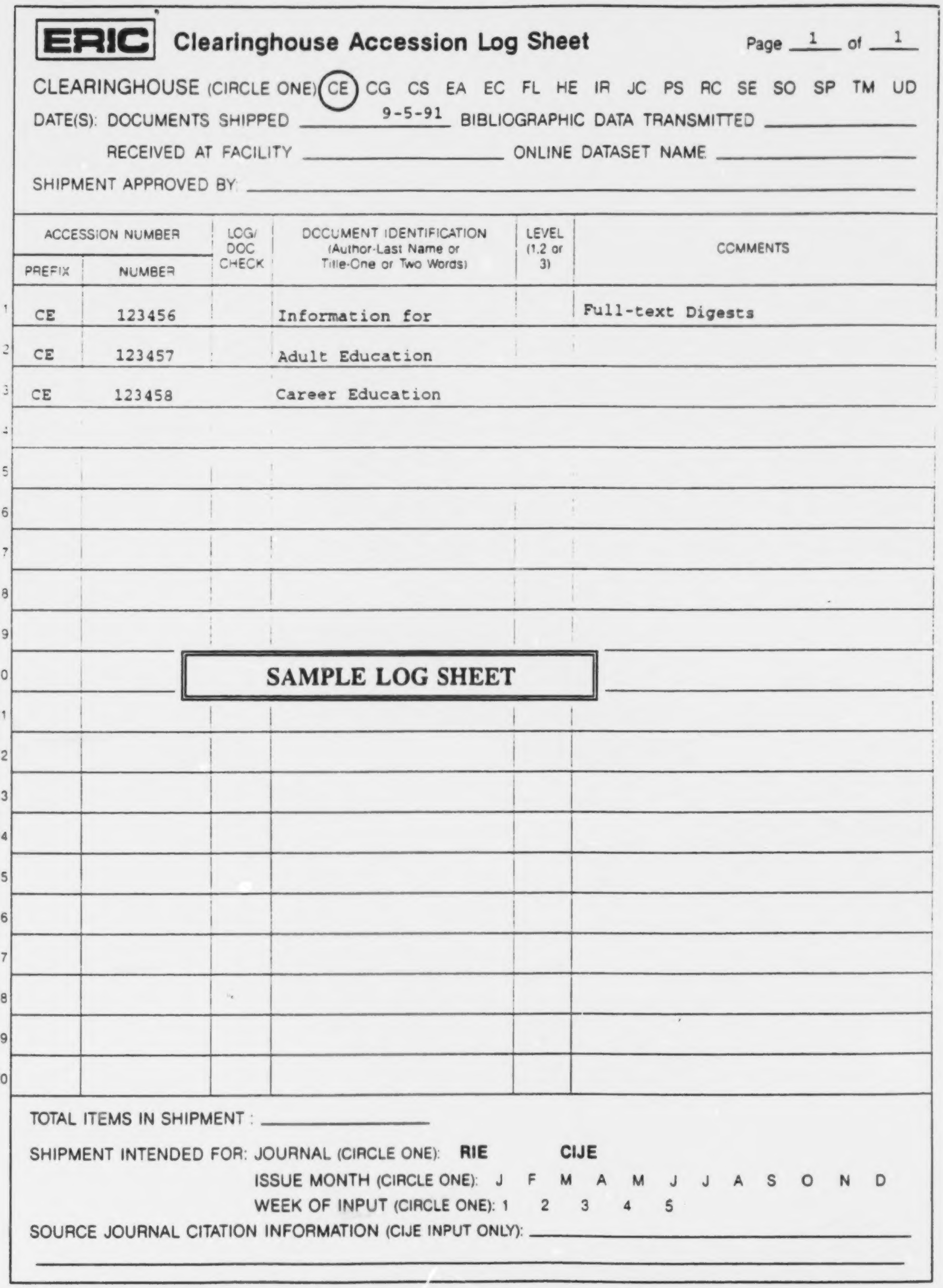
- Record the CH Accession Number in the lower left corner of the Digest (in pencil), just as on regular document input.
- Attach a paper copy of the corresponding RIE bibliographic citation for the Digest; this is simply a copy of the resume as transmitted for announcement in RIE. (This helps to ensure accuracy and avoid errors.)
- Prepare a separate standard ERIC Clearinghouse Log Sheet as a "shipping list" for this Digest or group of Digests. (See **Figure-IX-7** for an example.)
- Enter the date of transmission of the full-text record on the log sheet line "Bibliographic Data Transmitted."
- In the "Comments" section of the Log Sheet, enter "Full-Text Digests"; if a diskette accompanies the shipment, add a helpful notation in the same section, e.g., "Diskette Enclosed."
- Ship the Log Sheet, Published Digest(s), and paper copy of the resume(s) to the Facility in the same week as the corresponding RIE document is shipped and the Digest full-text is transmitted.

F. Acquisitions Data Report (ADR)

1. Introduction

The Acquisitions Data Report (ADR) is a file of document titles representing recent acquisitions that are "in process" at the Clearinghouses. The file is for RIE data only. Documents may be at virtually any stage of the processing cycle: evaluation, selection, reproduction release, accessioning, cataloging, indexing, abstracting, document preparation (for filming), etc. The minimum requirement is that they must have been assigned a Clearinghouse Accession Number, since that is their basic identifying "tag" in the ADR system.

The purpose of the ADR is to provide a mechanism by means of which the geographically dispersed ERIC Clearinghouses can become aware of what documents are currently being worked on throughout the system by all Clearinghouses combined, in order to avoid duplicate processing. (The use of the ADR for duplicate checking is discussed in Section II, "Acquisitions," of this Manual.)



ERIC Clearinghouse Accession Log Sheet

Page 1 of 1

CLEARINGHOUSE (CIRCLE ONE) [✓ CE] CG CS EA EC FL HE IR JC PS RC SE SO SP TM UD

DATE(S): DOCUMENTS SHIPPED 9-5-91 BIBLIOGRAPHIC DATA TRANSMITTED ______

RECEIVED AT FACILITY ______ ONLINE DATASET NAME ______

SHIPMENT APPROVED BY ______

	ACCESSION NUMBER		LOG/ DOC CHECK	DOCUMENT IDENTIFICATION (Author-Last Name or Title-One or Two Words)	LEVEL (1,2 or 3)	COMMENTS
	PREFIX	NUMBER				
1	CE	123456		Information for		Full-text Digests
2	CE	123457		Adult Education		
3	CE	123458		Career Education		
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

SAMPLE LOG SHEET

TOTAL ITEMS IN SHIPMENT : ______

SHIPMENT INTENDED FOR: JOURNAL (CIRCLE ONE): RIE CIJE

ISSUE MONTH (CIRCLE ONE): J F M A M J J A S O N D

WEEK OF INPUT (CIRCLE ONE): 1 2 3 4 5

SOURCE JOURNAL CITATION INFORMATION (CIJE INPUT ONLY): ______

EFF-38 (6/90)

FIGURE IX-7: ERIC Clearinghouse Accession Log Sheet (For Digests For EDO File)

Access to the data in the ADR is available to Clearinghouses and other ERIC components in two ways:

- An internal online file housed on a microcomputer at the ERIC Facility; and
- A printed publication issued monthly by the Facility reflecting the data entered on the online file during the prior six-month period.

The online ADR is a real-time online system. Clearinghouses are able to interrogate and update the file daily, weekly, or monthly, as they choose. The online ADR file is resident on a microcomputer at the ERIC Facility. This microcomputer is kept operating 24 hours a day, 7 days a week, so that it can be dialed into by any ERIC Clearinghouse or other component at any time. Clearinghouses can interrogate the file for individual titles and can add individual titles to the file, both in real time. Clearinghouses can also choose to add a batch of titles to the ADR. When the batch update option is selected, the update process actually takes place during the upcoming evening hours and the report on potential duplicates in the batch becomes available the next day. The Clearinghouses can dial up to obtain these reports on their batch input any time at least one night after they have input a batch.

The online file contains all data submitted to it during the preceding twelve months. For example, when the input for January 1993 is received, the entries added in January 1992 drop off. NOTE: Titles do *not* drop out automatically when they are announced in RIE.

On the first working day of each month, all entries added to the online file during the previous month are copied and transmitted to a mainframe computer which houses the ERIC computer system. A printed version of the ADR is then produced by this program; every published version reflects a six-month running cumulation (e.g.: January-June, February-July, March-August, etc.) although, as with the online version, a year's worth of data is retained on the file for duplicate processing purposes.

Copies of the printed version are sent to each Clearinghouse along with exception reports specific to each Clearinghouse. These "Clearinghouse Activity/Exception Reports" list alphabetically by title all newly added records for the month, records flagged as first time potential duplicates, records changed, records dropped (the routine monthly drops), and records purged by request. The printed ADR may be used for duplicate checking when staff at the Clearinghouse do not wish to go online to look up a title. The exception reports provide a double-check of the data that were entered online during the preceding month.

2. Clearinghouse Accessioning

Although the procedures for accessioning are discussed elsewhere in this Manual (see **Section II**), basic information is provided here to create a context for the discussion of data entry to the ADR.

Every document entering the ED portion of the ERIC database has a unique Clearinghouse Accession Number assigned to it that will identify that document as it is being processed for RIE. Normally this number is assigned to the document after it has been selected for entry into the database. Using either a paper ADR Input Form provided by the ERIC Facility or a list on a computer, a Clearinghouse records a Clearinghouse Accession Number and enters with each number a document title and related information. (See **Figure IX-8** for an example.) At that time, the number is physically added to the printed document as well. In order to avoid using a number more than once, a Clearinghouse must maintain a log or list in order by Accession Number.

Periodically (daily, weekly, biweekly, or monthly) these Accession entries are transmitted to the ERIC Facility either: (a) by sending a "batch" file containing all of the new entries; or (b) by entering each entry individually while online. Whichever method is chosen, all entries must contain the information indicated below:

- **Clearinghouse Accession Number** - eight spaces: 2 alpha (CH prefix) followed by six numeric.

- **Pagination** - Number of pages in the document - four spaces allowed. The figure can be the last numbered page of the document and need not be an exact count. Pagination is intended to provide a way to distinguish between documents with the same or similar titles. If the pagination cannot be determined or estimated easily, then an "NP" (right justified) may be entered.

- **Publication Date** - Date document was produced - seven spaces allotted (DDMMMYY). If the publication date cannot be determined or estimated from internal evidence, then an "ND" (right justified) may be entered.

- **Disposition** - Enter one of three codes to indicate status of processing for the title (one space allotted):

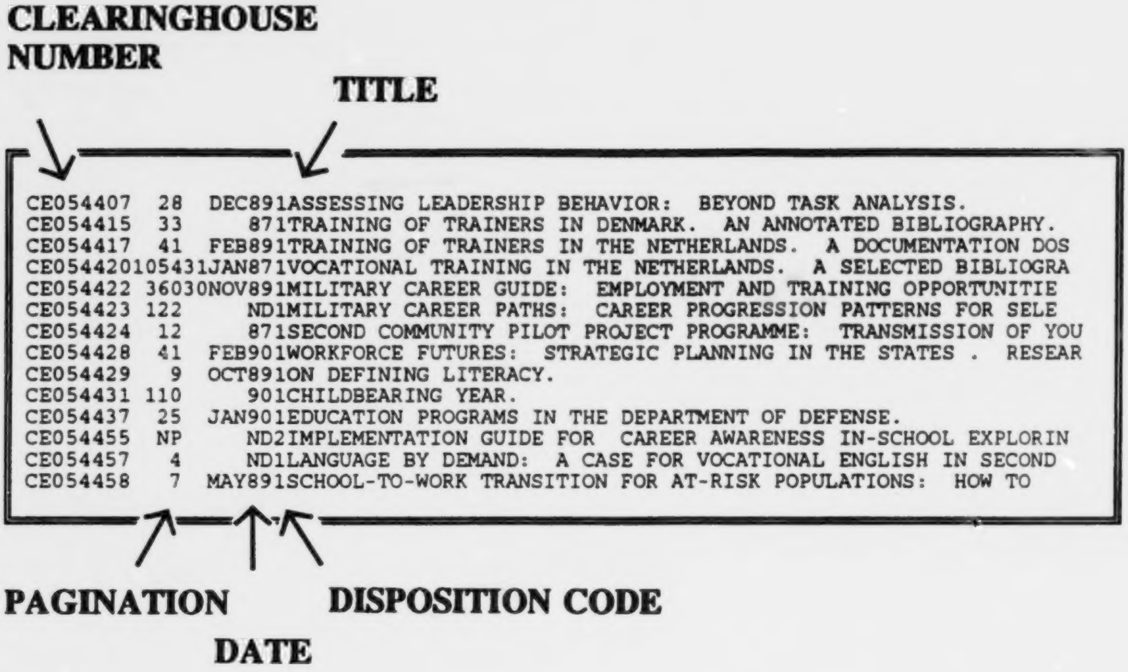
  1 - Selected for RIE, ready for immediate processing.

  2 - Selected for RIE, on hold awaiting release, legible copy, etc.

  3 - Selected for RIE, but for various reasons processing could not be completed.

  Completion of this field is *mandatory*. Rejects or items retained solely for local files should not be reported.

- **Title** - The title is recorded as it appears on the document including initial articles except for initial punctuation marks. Sixty spaces are allocated for the title. Use only one space after periods, commas, colons, etc. Use all 60 spaces if needed. If the title exceeds 60 spaces, use all of the spaces anyway; this will mean that some titles will be truncated. Do not use ellipses "..."



```
CE054407  28  DEC891ASSESSING LEADERSHIP BEHAVIOR:  BEYOND TASK ANALYSIS.
CE054415  33     871TRAINING OF TRAINERS IN DENMARK.  AN ANNOTATED BIBLIOGRAPHY.
CE054417  41  FEB891TRAINING OF TRAINERS IN THE NETHERLANDS.  A DOCUMENTATION DOS
CE054420105431JAN871VOCATIONAL TRAINING IN THE NETHERLANDS.  A SELECTED BIBLIOGRA
CE054422 36030NOV891MILITARY CAREER GUIDE:  EMPLOYMENT AND TRAINING OPPORTUNITIE
CE054423 122     ND1MILITARY CAREER PATHS:  CAREER PROGRESSION PATTERNS FOR SELE
CE054424  12     871SECOND COMMUNITY PILOT PROJECT PROGRAMME:  TRANSMISSION OF YOU
CE054428  41  FEB901WORKFORCE FUTURES:  STRATEGIC PLANNING IN THE STATES .  RESEAR
CE054429   9  OCT891ON DEFINING LITERACY.
CE054431 110     901CHILDBEARING YEAR.
CE054437  25  JAN901EDUCATION PROGRAMS IN THE DEPARTMENT OF DEFENSE.
CE054455  NP     ND2IMPLEMENTATION GUIDE FOR  CAREER AWARENESS IN-SCHOOL EXPLORIN
CE054457   4     ND1LANGUAGE BY DEMAND:  A CASE FOR VOCATIONAL ENGLISH IN SECOND
CE054458   7  MAY891SCHOOL-TO-WORK TRANSITION FOR AT-RISK POPULATIONS:  HOW TO
```

FIGURE IX-8: Clearinghouse Input to the ADR (Sample Data, with Callouts)

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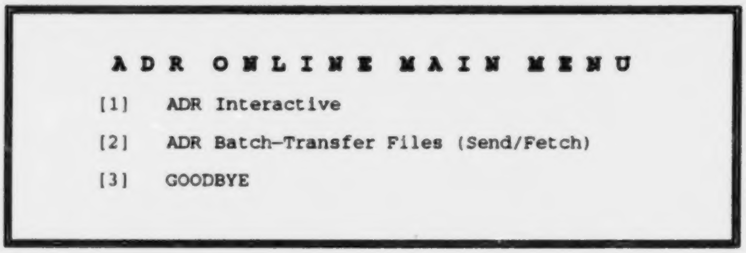
3. ADR Online System

Information on connecting to the online system, sign-on, sign-off commands, etc. has been provided to each ERIC Component in the *ADR Operating Procedures* issued in 1992 and is, therefore, not duplicated in this Manual. Only those aspects of the ADR Online relating to the data entry of accessions either interactively or in batch mode are described.

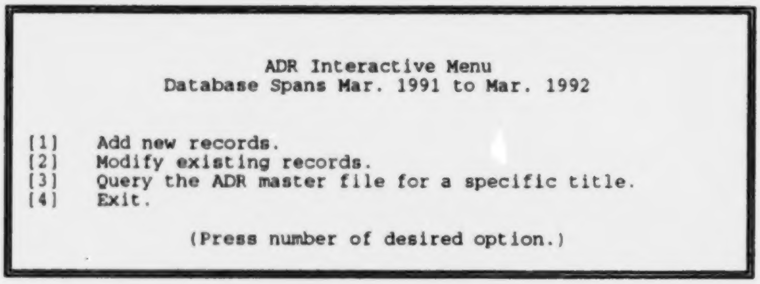
The ADR Online main menu shown below has two options for processing accessions—"ADR Interactive" and "ADR Batch—Transfer Files (Send/Fetch."



```
ADR ONLINE MAIN MENU

[1]   ADR Interactive

[2]   ADR Batch-Transfer Files (Send/Fetch)

[3]   GOODBYE
```

a. ADR Interactive (Option 1)

Option 1 brings up the ADR Interactive menu. This system is interactive in the sense that the user may directly edit individual entries, add new records, modify existing records, or query the master file. The various options are explained in the following discussion.



```
                    ADR Interactive Menu
           Database Spans Mar. 1991 to Mar. 1992

[1]   Add new records.
[2]   Modify existing records.
[3]   Query the ADR master file for a specific title.
[4]   Exit.

               (Press number of desired option.)
```

ACTION: Select Option from Screen.
(Summary Explanation of Options Listed Below.)

SUMMARY EXPLANATION OF OPTIONS

Option 1	*"Add new records."* This option is used to add individual records to the file, one at a time (i.e., *not* batch mode).
Option 2	*"Modify existing records."* This option is used to change individual records already on the file, or to delete existing records.
Option 3	*"Query the ADR master file for a specific title."* Use this option to scroll up or down through the Master file or to look for a specific title. This is the command you would use to duplicate check a single title in hand.
Option 4	*"Exit"*. Select Option 4 to exit the interactive mode and return to the ADR online main menu.

OPTION 1

```
                    ERIC ADR Database Update
                        ADD NEW RECORDS
               Database Spans Mar. 1991 to Mar. 1992


Title [                                                        ]
Clearinghouse Accession Number [        ]
Page Count [        ]
Publication Date   [        ]
Disposition Code  [  ]

       SAVE          ==> Ctrl S
       NEXT          ==> Ctrl N
     DELETE          ==> Ctrl D
       QUIT          ==> ESC
```

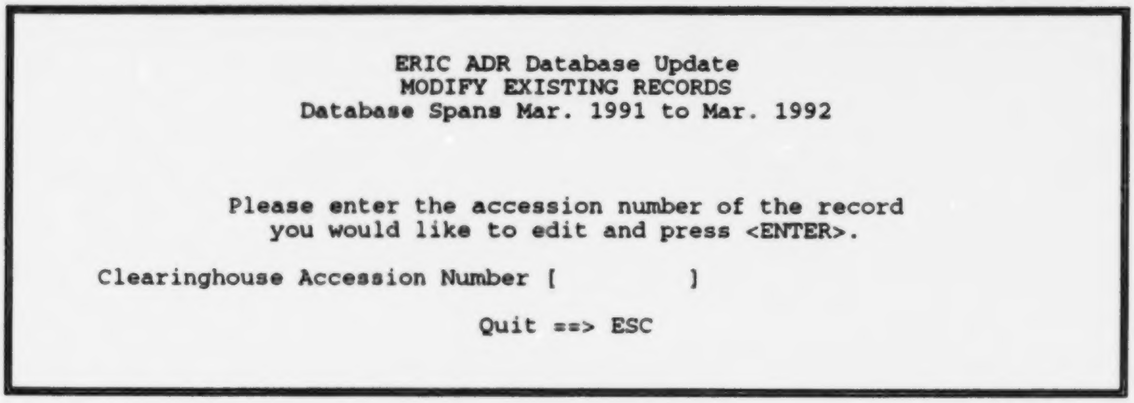
ACTION: Enter the ADR Data Elements into Their Respective Fields

Option 2 is used to add individual titles—in real time, not in batch mode—to the ADR Online.

Fill in all the data in the spaces allotted. The backspace key may be used to correct errors. Be certain to hit CTRL S for SAVE, if you are satisfied with the entry you have created. To insert a character or characters in an existing record, press the "INS" key and then type the character(s) to be inserted. To advance to the next field, press the "down arrow" key.

"*Saved*" records are added to the ADR Master File. Clearinghouses will probably use this option only occasionally, for example, when a PRIORITY document needs to be processed quickly or when an item has been inadvertently dropped from a batch mode update.

OPTION 2



```
                    ERIC ADR Database Update
                    MODIFY EXISTING RECORDS
                Database Spans Mar. 1991 to Mar. 1992


             Please enter the accession number of the record
               you would like to edit and press <ENTER>.

   Clearinghouse Accession Number [         ]

                           Quit ==> ESC
```

ACTION: Enter the Clearinghouse Accession Number to be Modified.

Select *Option 2* to modify an existing record. Use the Clearinghouse Accession number to call up the desired record. To delete a record, press the CTRL and "D" key simultaneously.

OPTION 3

```
Enter search title:
 *******************************TOP OF FILE*******************************
    100 COMMONLY ASKED QUESTIONS ABOUT THE NEW AHERA ASB
                  SE050092  61   MAY91 1   8-18-91
    100 NEW PLAY IDENS FOR MONDAY MORNING.
                  PS017703  40      92 1   2-28-92
    100 YEARS OF KINDERGARTENS IN FINLAND.
                  PS017692  19   FEB91 1     12-13-91
    101 CRITERIA FOR APPRAISING INTERACTIVE VIDEO.  A FUT
                  IR013862  20      90 1   9-18-91

  ******************************BOTTOM OF FILE**************************
```

ACTION: Enter the title of the document you wish to locate in the ADR master file.

Option 3 permits you to query the ADR for a specific title and to see the desired title in alphabetic context. Enter the title to be searched on the top line. The system will then look up the title keyed.

You may scroll up and down through the data, "browsing" as desired, using "PgDn" and "PgUp" keys, or the up and down arrow keys.

Note that the entries contain all of the data normally found in the printed ADR, but the shorter screen format requires two lines to display it. The title appears on line 1. On line 2 is the Clearinghouse Accession Number, page count, publication date, disposition code, and date added to the ADR, in that order.

OPTION 4 "EXIT"

Option 4 permits the user to EXIT Menu 1 and either go to Menu 2 to transfer batch files or exit the ADR Online system.

b. ADR Batch (Option 2)

Option 2 (ADR Online Main Menu) permits the user to "SEND" or "FETCH" files of ADR entries to and from the ADR On-line system. Files that are prepared offline and transmitted will be processed by the system overnight, and an exception report will be produced for reviewing the following day. The system will assign this exception report file the same name that was specified when the file was transmitted, plus the extension ".ERR," e.g., "CE040192.ERR". This file can be downloaded to the user's microcomputer, using the "FETCH" command, and printed offline.

(1) General Guidelines

The basic guidelines for sending a batch transmission are:

- The Clearinghouse must have previously prepared a body of ADR data as a machine-readable dataset on its microcomputer. The file must be stored under a file name, and the file name must conform to the following format:

  XXMMDDYY

  XX= Clearinghouse ID (AA, CE, PS, UD, etc.)
  MM= Month (01, 02, etc.)
  DD= Day of Month (01, 02, 03, etc.)
  YY= Year (92, 93, 94, etc.)

  File names not conforming *exactly* to this format will go undetected by the computer program.

  Also the date contained in the file name must match the date a file is sent. That is, do not create a file name AA032892 (i.e., March 28, 1992) and transmit it two days later (March 30, 1992) without changing the date. The program uses the date as a pointer for processing the data each night. For example a file marked "AA032892" will be batch processed, along with all other files sent the same day, in the later evening of March 28, 1992—no other files are processed. On March 29, only files with a date of 032992 will be processed, and so forth. If the file doesn't correspond to the date sent, the program will not know to process it.

- The file must be in a known location, i.e., is it in the root directory, the A: directory, or possibly in the subdirectory of the communications package.

- The same rules for format and length of data apply as discussed earlier in F.2, "Clearinghouse Accessioning."

  NOTE: All entries must use fixed spacing, one entry per line. Each new entry begins at position 1, sometimes called column 1. All items within an entry must stay within their assigned positions; each item and its position range is listed below:

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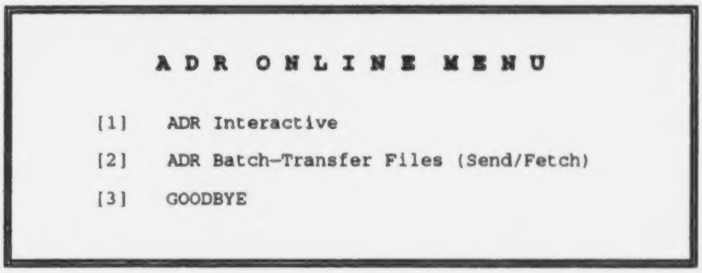
Clearinghouse Accession Number - Positions 1-8
Pagination - Positions 9-12; right justified
Publication Date - Positions 13-19; right justified
Disposition - Position 20
Title - Positions 21-80

Do not exceed Position 80.

- If possible, please spell-check ADR batch data before transmission. This is not a rigid requirement, but it helps to avoid title comparison failures.
- Data must be in ASCII code. Each line must end with a hard return.
- Send only one batch of ADR data per Clearinghouse per day (to avoid the second batch overlaying the first).
- Use only PROCOMM or PROCOMM PLUS (PcPlus) to transfer the data.

(2) Transferring Files

To send an ADR data file, select option 2 from the ADR Online menu:



```
ADR ONLINE MENU

[1]   ADR Interactive

[2]   ADR Batch-Transfer Files (Send/Fetch)

[3]   GOODBYE
```

SCREEN: Would you like to (S)end or (F)etch files?

YOUR RESPONSE: (S/F): S *or* (S/F): F

SCREEN: Please start transfer now (PgUp!!)

YOUR RESPONSE: Hit the PgUp key

NOTE: Once the PgUp key has been hit, select the proper file transfer protocol Use Y-modem batch.

—PROCOMM users select — 6;
—PROCOMM PLUS (version 1.1) users select — 12;
—PROCOM PLUS (version 2.0) users select — Y.

PROCOMM will ask for the filename. Enter the filename using the format CHMMDDYY (e.g., AA040792). Always include the complete path to the file.

FILENAME EXAMPLES: A: CE040792
C: \WP51\PS040792
C: \PCPLUS\DATA\IR040792

A window containing information about the progress of the file transfer should appear. PROCOMM/PROCOMM PLUS will take it from there. If an abort message is received, try to transfer again.

You will automatically be returned to the menu after the completion of the file transfer.

(3) Fetching Files

There are two principal reasons for "fetching" a file:

- to make certain that a file that was transmitted was successfully received by the ADR system;
- to review errors and potential duplicates in data transmitted.

(a) Checking Transmitted Data

A Clearinghouse may wish to examine a file just sent in order to ensure that all data sent were received. A Clearinghouse may wish to determine what files have been sent during a month in question. If a file is "fetched" the same day it is sent, it is identified by the same characters used by the Clearinghouse to identify it. If it is fetched the following day it is identified with the extension ".TXT".

(b) Retrieving Clearinghouse Error and Potential Duplicates Reports

Clearinghouse Error and Potential Duplicates reports are named by attaching the extension ".ERR" to the original Clearinghouse ID, e.g., "CE040792.ERR". They are available the day *after* a batch has been input and are retained on the system for a period of two months.

Data errors detected by the system remain unchanged until corrected by the Clearinghouse. To correct errors or delete records, use Option 2, **"Modify Existing Records"** on the ADR Interactive menu.

Potential duplicates should be resolved. Duplicates of the Clearinghouse's own input must be resolved on the basis of in-house records. Duplicates of another Clearinghouse's title must be resolved by first determining whether the item has entered the database yet. This can often be done via the *Clearinghouse Number to ED Number Cross-Reference List*. If the item is already in the database, the Clearinghouse with the later duplicate should simply delete its ADR record for the item. If the item is not yet in the database, the two Clearinghouse's should negotiate who is to process the item. If the item has been shipped by both Clearinghouses or if each Clearinghouse believes the item is properly theirs, responsibility for resolving the duplication passes to the Facility. If research reveals that the item in hand is not a true duplicate, then, of course, processing can proceed unimpeded.

The steps in fetching an Error file are as follows:

```
Step 1:    Select Option 2 on the Main Menu 'ADR
           Batch-Transfer Files (Send/Fetch)'

Step 2:    Select the (F)etch option.

Step 3:    Enter the filename of the file to be
           fetched.  You may use DOS 'wildcard'
           characters, e.g., * and ? for part of
           the file.  Do not use a path or drive
           designator.
```

Filename Examples:

CE040292.ERR	(CE's error file for April 2, 1992)
FL*.ERR	(*all* of FL's error files. Not recommended.)
IR04*.ERR	(all of IR's April error files)
JC041?92.ERR	(all of JC's April error files that were generated between April 10 and April 19)

Do not use *.* or *.ERR or XX*.ERR or XX*.* because these open-ended formats will fetch too many files.

```
Step 4:    Hit the PgDn key and then select a file
           transfer protocol (y modem batch).

           -PROCOMM users use #6.
           -PROCOMM Plus (version 1.1) users use #12.
           -PROCOMM Plus (version 2.0) user use Y.

           After selecting the protocol, a file transfer
           window will report on the transfer's progress.
           When transfer is complete, you will be
           returned to the menu.
```

c. "Goodbye": Leaving the ADR Online (Option 3)

The selection of Item 3 "Goodbye" on the main menu exits the user from the ADR Online and resets the program for the next user.

4. ADR Data Transmission

a. Transmission Schedule

ADR data should be transmitted periodically throughout a particular month. All Clearinghouses are expected to transmit *at least* monthly to the ADR. If for some reason a Clearinghouse cannot transmit to the ADR Online system for a particular month (e.g., phone line difficulties, modem needing repair, etc.), the Clearinghouse should contact the Facility's computer department—preferably before the end of the month in question. Arrangements will then be made to receive the data by other means, usually by mailed diskette. Data not sent via the ADR Online system are still expected to be inhouse at the Facility by the last day of the month.

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Section X: Database Changes (Post-Publication)

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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DATABASE CHANGES (POST-PUBLICATION)

Summary of Significant Rules

1. Documents and journal articles should not be re-entered (re-accessioned) into the database and re-announced simply for the purpose of accomplishing a change to their records or level of availability. Rather, the existing record should be corrected/changed.

2. Changes to the existing database on a post-publication basis are expensive; however, errors affecting contributors, the identity of the document, its EDRS availability or price, or its retrievability under important access points should be corrected. Minor typographical, spelling, or punctuation errors, or other errors that do not affect the factors listed above, are not critical and in isolated instances need not be corrected. The ERIC Facility is responsible for approving all post-publication changes to the master ERIC database.

3. Lexicographic changes made to the ERIC *Thesaurus* and/or *Identifier Authority List* (IAL) are eventually reflected, via backfile changes, in all resumes carrying the changed terms.

4. Post-publication changes are made to the database twice a year, immediately prior to the preparation of the cumulative indexes.

5. In the case of duplicate records detected post-publication, the "best" record will be retained in full and the other record will be truncated to prevent its retrieval and will be cross-referenced to the record retained.

6. EDRS Availability changes can be from Level 1 to 2 or 3, or from Level 2 to 1 or 3. There is currently no provision for changing from Level 3 to 1 or 2.

7. Microfiche header and content errors that are caused by EDRS are correctable under the terms of their contract and should be called to their attention.

8. Refilming and redistribution of a document due to a contributor, Clearinghouse, or Facility error (but not an EDRS error) is expensive and each such recommendation must have the prior approval of Central ERIC.

X. DATABASE CHANGES (POST-PUBLICATION)

A. Introduction

The purpose of this section is to specify the procedure for making changes to the ERIC database *after* the data involved have been announced in RIE or CIJE (or after the abstract journal issue in which the data will be announced has passed its cut-off point for changes).

The cut-off point for changes for both journals is *approximately* five (5) weeks before its publication date (the first of the month whose name the issue bears) and can be determined precisely from the current RIE and CIJE Master Schedules. Changes *prior* to that point can be made without restriction by a simple telephone call to the RIE editors at the ERIC Facility (or, in the case of CIJE, the CIJE editors at the CIJE Publisher), with written confirmation following, where appropriate (see **Section IX** for details on pre-publication changes). Changes *after* that point are subject to the policies and procedures described below.

B. General Policies

1. Re-announcement Policy

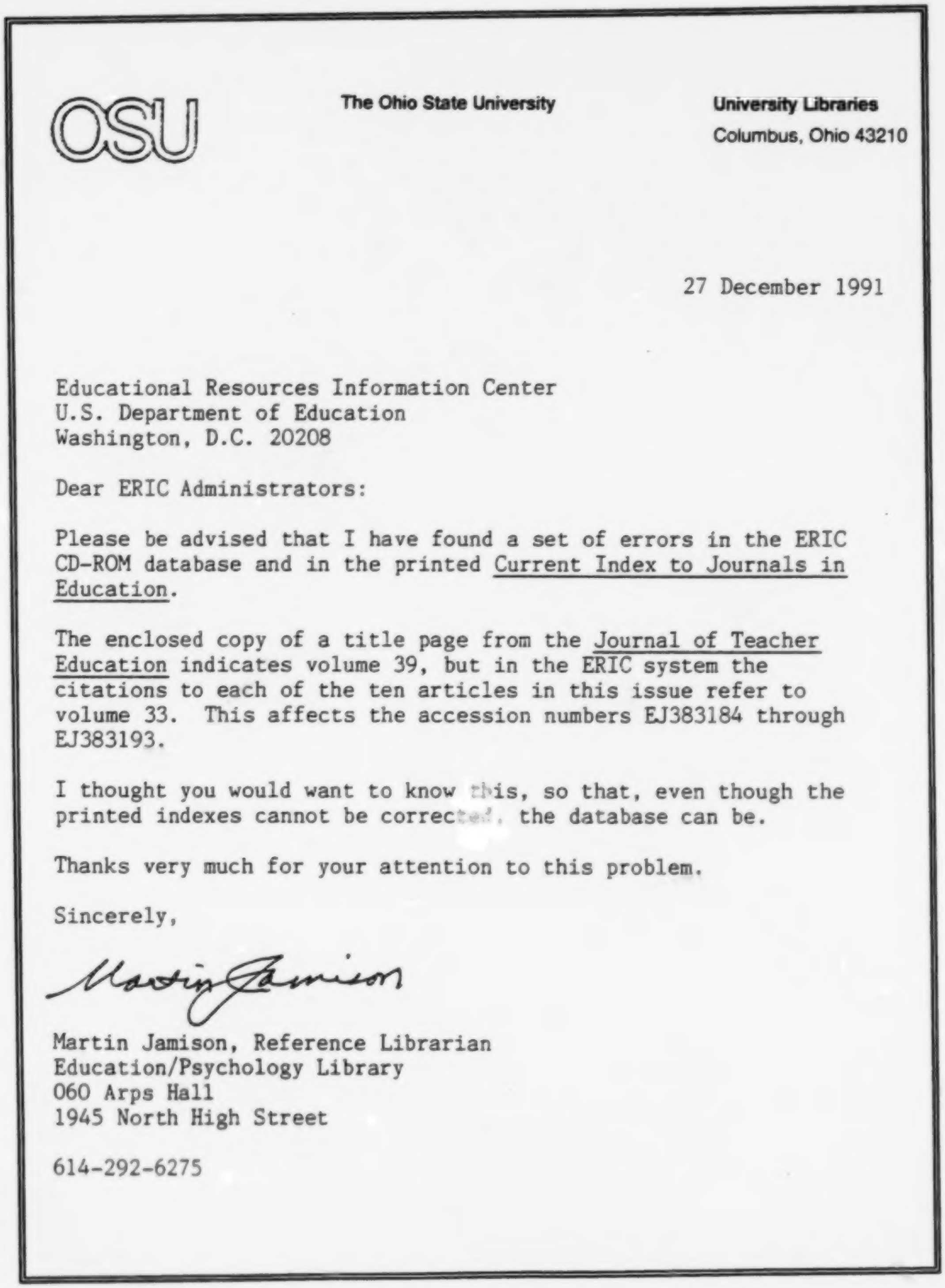
As a matter of general policy, a document or journal article will *not* be re-announced or re-entered into the database as a new accession for the purpose of accomplishing a change to its record (e.g., a Level of Availability change). It is not desirable to create essentially duplicate records in the database because of the long term adverse effect of such duplicates on retrieval activities. It is preferable to make a change to an existing record and to see that the database files distributed to vendors are eventually updated with such changed records. Attempts to re-announce a document or journal article will generally be detected as duplicates and treated as such during Facility processing.

2. Acceptable vs. Non-Acceptable Changes

Changes to a database record after publication can be of varying degrees of importance and acceptability. Changes can be classed as either corrections or requested alterations.

Following the production of the printed monthly abstract journal, the monthly computer file, or the microfiche, errors such as typos, absence of data, incorrect or garbled data, may be detected and corrections may be requested. An example of a request to correct such an error (incorrect volume number cited in journal citation) can be seen in **Figure X-1.**

Occasionally authors or institutions may request an alteration in a document description even though the ERIC record accurately reflected the document as issued. An example of such a request might be to add an author not appearing on the document or to delete a name that did appear. Since the ERIC rule is "to catalog from the piece," without additional research, alteration requests are generally not honored. Some examples are treated below:



OSU

The Ohio State University

University Libraries
Columbus, Ohio 43210

27 December 1991

Educational Resources Information Center
U.S. Department of Education
Washington, D.C. 20208

Dear ERIC Administrators:

Please be advised that I have found a set of errors in the ERIC CD-ROM database and in the printed Current Index to Journals in Education.

The enclosed copy of a title page from the Journal of Teacher Education indicates volume 39, but in the ERIC system the citations to each of the ten articles in this issue refer to volume 33. This affects the accession numbers EJ383184 through EJ383193.

I thought you would want to know this, so that, even though the printed indexes cannot be corrected, the database can be.

Thanks very much for your attention to this problem.

Sincerely,

Martin Jamison

Martin Jamison, Reference Librarian
Education/Psychology Library
060 Arps Hall
1945 North High Street

614-292-6275

FIGURE X-1: SAMPLE LETTER REQUESTING A POST-PUBLICATION CHANGE

As a general rule, any errors that would affect an upcoming printed index should be corrected. Minor spelling and typographical errors that would have little or no effect on contributors' sensibilities, document identity, printed indexes, or computer retrieval, need not be corrected post-publication.

a. Personal Author, Preparing Institution

Errors in the Personal Author or Preparing Institution fields can be troubling to the contributors of documents and often must be corrected for public relations reasons, no matter how small they may be.

On the other hand, alterations requested by an author or institution that are at variance with the information actually on the document must usually be rejected. Examples of such requests are: (1) author has since married or divorced and wants name changed accordingly; (2) a person claims to be an author whose name was left off a document; (3) an institution requests its name be recorded in a way that doesn't conform to ERIC or standard cataloging practice, e.g., with a *"The"* in front of the name. ERIC clearly cannot get involved in continually "updating" the names of the hundreds of thousands of authors it has recorded over the years. The rule is simple: author names are, with rare exceptions (e.g., obvious misspelling), recorded as the name appears on the document. Requests to be added as an author or to have author names deleted or re-sequenced *must* be accompanied by documentation from the other authors and/or institutions involved indicating that the requested alteration is acceptable by all parties that it affects. ERIC must avoid getting in the middle of disputes between document-generating entities. When in doubt, the prudent course is to stay with what was published on the document.

b. Title, Journal Citation, Publication Date, Report Number

Errors in these fields can impact the basic identity of the document and must often be corrected in order for the document to be correctly identified in future transactions.

Sometimes an author or institution may request an alteration in these fields that does not conform to standard cataloging practices. For example, an author might request unjustifiably that a conference paper be given a journal citation for the journal to which the paper has been submitted for possible publication. An explanation of the reasoning behind the cataloging practice will usually suffice to deflect such requests.

c. Availability, EDRS Availability, Pagination, Level

Errors in the Availability field (e.g., a wrong address) that would affect the ability of users to obtain the document must be corrected. Similarly, errors in the Pagination or Level fields that would create an incorrect EDRS availability or price must also be corrected. An error in the Level field that causes the document to be made available at variance with the preparing institution's wishes must be corrected.

However, requests to change the information in the Availability field simply to keep it up-to-date (e.g., price increases, going out-of-print, organization changes location, etc.) are not acceptable. ERIC records the availability of a document at the time it originally catalogs it. Eventual changes in this information are a "fact of life," generally recognized by users. ERIC cannot attempt to keep abreast of all the changes in external availability for the thousands of documents in its database carrying such information.

d. **Contract Number, Language, Geographic Source, Publication Type, Governmental Status, Target Audience**

Errors in these fields, while of less urgency because they do not seriously affect either the contributor's sensibilities, the basic identity of the document, or its availability or price, should nevertheless be corrected because they can affect retrieval efforts.

The Contract Number, Language, Geographic Source, and Governmental Status fields deal with matters of fact that can be objectively determined. There should be no problem in evaluating requested changes to these fields. The Publication Type and Target Audience fields are "indexing" fields more dependent on the subjective judgment of the cataloger and less open to exact determination.

e. **Descriptor, Identifier**

Because of the computer process by which Descriptors are validated against the ERIC *Thesaurus*, errors in the sense of spelling errors do not occur in this field. However, format and/or spacing errors may still occur (e.g., *"Data Bases"* in lieu of *"Databases"*) and need to be corrected when detected. Also, valid Descriptors that are "incorrectly" assigned for other reasons should be corrected as they have an impact on both printed cumulative indexes and on computer retrieval.

Although Identifiers are validated by computer against the *Identifier Authority List* (IAL), the program only calls non-IAL Identifiers to the attention of the editors and does not automatically delete new Identifiers; thus spelling and format errors can occur. Such errors should be corrected as they have an impact on printed indexes and computer retrieval.

f. **Abstract/Annotation**

Abstract field changes are expensive in that the entire lengthy field must be re-keyed. Correction of abstract errors are generally limited to those accessions where: (1) two abstracts have been accidentally switched; (2) lines of abstract text have been inadvertently dropped; (3) errors in words have conveyed significant faulty information (e.g., the word *"insignificant"* keyed instead of *"significant").*

Minor changes in this field (e.g., spelling or punctuation) should not normally be accepted. Errors of this type do not normally have an effect on the factors referred to previously and can be tolerated without significant harm to the database.

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Abstractor initials are not significant in any database application and any errors occurring there need not be corrected post-publication.

3. Responsibility for Making Database Changes

Post-publication changes may be recommended by users or any component of the ERIC system. ERIC Clearinghouses routinely receive copies of the Single Frame Resumes (SFRs) each month in advance of the printed RIE issues and have an early opportunity to detect errors. All post-publication change recommendations should be forwarded in writing to the ERIC Facility to the attention of the Facility Editors.

Responsibility for deciding what changes are acceptable and which are not acceptable rests with the ERIC Facility. In difficult or controversial cases, the Facility will obtain the concurrence of its Central ERIC monitor before taking final action.

In all change situations it is useful to keep in mind that the ERIC Facility is responsible for the integrity of the ERIC Master Magnetic Tapes and the ERIC Reproduction Service (EDRS) is responsible for the integrity of the Microfiche Master Rolls.

4. Vocabulary-Based Backfile Changes

The ERIC Facility (Lexicography Department) is responsible for making backfile changes based on lexicographic changes made to the ERIC *Thesaurus* and/or the *Identifier Authority List* (IAL). In such cases, all resumes in the ERIC files affected by the terms being changed are changed to agree with the latest lexicographic decisions. When such changes involve the deletion of terms and their transfer to another term or terms (e.g., Identifier to Descriptor), they are called "Transfer and Delete" transactions.

5. Schedule for Making Changes

Changes to the RIE and CIJE backfiles require the total re-duplication of the backfile and for economic reasons cannot be made frequently.

While recommended changes may range across the entire database, the majority usually concern relatively recent announcements and therefore should be accomplished in time for the cumulative indexes.

Backfile changes are done twice annually, following the production of the June and December issues and in connection with the preparation of the cumulative indexes. Typically the backfile correction cycle takes place during the month of July for the January-June cycle and during January for the July-December cycle.

6. Backfile Update Tapes (for Database Retrieval Vendors)

Once a year, immediately after completion of the last cumulative index and backfile update for that year, a tape will be generated containing the full record of every accession affected by backfile change activity that year. This tape will be duplicated and made available on demand to all retrieval system vendors, and other tape subscribers.

This updating procedure, involving only a relatively small number of records each time, is to be distinguished from a complete file reload, which requires that *all* records be replaced.

C. *Procedures for Making Changes*

1. Clearinghouse Actions

While most recommendations for database changes come from the ERIC Clearinghouses, the procedures noted below also pertain to Central ERIC, the CIJE Publisher, or any other ERIC component submitting a change.

To request a change, a Clearinghouse should send the Facility, in writing, the following information:

a. **Accession Number** (ED or EJ Number) of the document or article to be changed.

b. **Title** of the accession (to insure against error in recording the accession number). A Xerox copy of the resume from the announcement journal is a convenient way to meet this and the above requirement.

c. **Error detected or change** to be accomplished. Please be as specific as possible so that there is no ambiguity in what should be done.

d. **Justification**. For outright errors no justification is needed. It is sufficient to call an error to the Facility's attention and to leave the decision as to whether to correct up to the Facility. However, for other kinds of changes, the submitter should provide a reason. If the submitter wants a specific outcome, that outcome should be stated and/or documented.

e. **Supporting Documentation.** A copy of any written communication from the document/article author or source, pertaining to the change or providing an explanation of the reason for needing the change, should be attached. If the requester is not the primary author or source of the document and is requesting an alteration be made to the cataloging which would result in the requester replacing or being listed as the primary author or institution, written communication from the original primary author or contributing institution agreeing to such a change should be provided. Although rare, on occasion authors and/or institutions may disagree as to who should be given credit for a document. It is important that ERIC not act precipitously in such cases, but act only after the authorized *"owner"* of the document has agreed to the change.

> NOTE: Many requests for changes, especially alterations to cataloging, originate from an author or institution first contacting a Clearinghouse. Prior to actually processing a change request, it may be advisable for the Clearinghouse to telephone the ERIC Facility's Senior Editor to discuss the requested change. Some requested changes, for example typographical errors, may already have been corrected and thus will not require any further action by the Clearinghouse other than feedback to the requester. In other cases, once the ERIC backfile change policy is explained to the requester, the request may be withdrawn.

2. Facility Actions

Upon receipt of the change recommendation, the Facility will:

a. Verify the way the data in question exist on the Master File.

b. Evaluate the change recommendation and decide whether it is acceptable or not acceptable.

c. Consult with Central ERIC (via the Facility monitor) on any problem cases or controversial changes.

d. If the change is accepted, file it with all other accepted changes to be made at the next scheduled backfile update.

e. If the change is not accepted, provide feedback to the submitter, where appropriate.

f. Make the change, at the next backfile update (every six months).

g. Include the entire changed record on the Backfile Update Tape which will be made available on demand to all database retrieval vendors (as well as all other tape subscribers).

D. Procedures for Handling Duplicate Records

All duplicates detected in the ERIC Master File should be brought immediately to the attention of the ERIC Facility. The general procedure is the same as for other kinds of changes. However, the Facility's final action on the file is slightly different in that a record is not so much changed as "de-commissioned" and taken out of circulation.

When duplicates are discovered, the Facility must decide which record to keep and which record to, in effect, discard. All other things being equal, the earlier record is retained and the later record (the one that "duplicated") is discarded. If, however, the later-appearing record is clearly the superior record in terms of the indexing and abstracting, or if it has a better level of availability to the public, then it is possible to decide in favor of retaining the later record.

Because the announcement of the duplicate in RIE has already taken place and because its microfiche has already been distributed, it is felt better to "skeletonize" (see next paragraph) the duplicate record and, by this process, take it out of circulation, rather than to totally expunge it from the tape files. The announcement and distribution that has already taken place cannot be totally negated and, therefore, it is better for ERIC to retain a record of what has happened than to have the record involved lost.

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At the same time, it is not desirable for the duplicate record to continue to emerge as a result of retrieval activities or in various publication by-products. In order to prevent this from happening, the duplicate is "skeletonized." That is, all the data elements that index the record are deleted and a note is inserted that will lead the user to the retained record. The only elements of a duplicate record that are retained are:

RIE: Accession Number, Title,
Note (e.g., "Duplicate of ED 123 456")

CIJE: Accession Number, Title, Journal Citation,
Note (e.g., "Duplicate of EJ 123 456")

The ERIC Facility will maintain a Master File of all duplicates detected in the ERIC files post-publication.

E. Special Procedures for Changes Affecting EDRS (e.g., EDRS Availability and Price Changes, Microfiche Header Changes, Refilming, etc.)

The ERIC Document Reproduction Service (EDRS) is a separate component of the ERIC system, operating under its own contract and scope of work. Errors created by EDRS during filming and microfiche production are corrected by EDRS without additional cost to the Government. Errors in the microfiche caused by other ERIC components may involve a cost to the Government if refilming and/or redistribution are involved. For this reason, change recommendations involving refilming and redistribution require the approval of Central ERIC. Central ERIC also approves all changes involving a reduction in EDRS availability (e.g., Level 1 to Level 2 or 3) based on reproducibility of the document experienced at EDRS.

1. Increasing EDRS Availability

a. From Level 2 to Level 1

This change generally occurs when the source cited for paper copy in the original announcement at Level 2 has exhausted its stock and is therefore now willing to let EDRS reproduce in paper copy, as well as in microfiche or other non-paper forms.

(1) Clearinghouse Actions

To request a change, a Clearinghouse should send the Facility, in writing, the following information:

(a) The **Accession Number** (ED Number) of the document.

(b) The **Title** of the document (to insure against error in recording the accession number).

(c) A copy of the **authorization** from the source to make the change from Level 2 to Level 1, or a statement to the effect that the Clearinghouse has received such authorization. (Authorization is not required if the source cited in the announcement was GPO.)

(d) A copy of any **written communication** from the document source pertaining to the change, or an explanation of the reason for needing the change.

(2) Facility Actions

Upon receipt of the communication from a Clearinghouse, the Facility will:

(a) Verify the existing EDRS Availability Level as it appears on the Resume Master File.

(b) Schedule required changes to the record for the next backfile correction cycle.

(c) Determine the paper copy price (via current EDRS price schedules) and inform EDRS, in writing, of the change, providing the information necessary to accomplish the change in their records.

(d) Keep a permanent file of Level change communications, by ED number.

(3) EDRS Actions

Upon receipt of the change information from the Facility, EDRS will alter its records and files as required *and will subsequently fill requests for paper copy as received.*

b. From Level 3 to Level 1 or 2

There is currently no mechanism within the ERIC system for changing the availability level of Level 3 accessions. The reasons are technical and relate to the reprographic techniques used to store and duplicate ERIC microfiche.

Due to the heavy demand for back collections of ERIC documents, it is necessary for the microfiche master (and production masters) to be on roll film. It is not possible to splice a previously missing (i.e., Level 3) fiche *into* the master roll without damaging the adjacent masters.

This limitation on Level 3 accessions can sometimes be cited in attempts to acquire copyright releases from contributors who initially reject giving ERIC Level 1 or 2 permission.

2. Reducing EDRS Availability

a. From Level 1 to Level 2

This change generally occurs under one of two possible circumstances:

- a document was mistakenly processed at Level 1 when the source intended to authorize only Level 2, or
- a document has been found by EDRS's actual experience to reproduce inadequately (for sale purposes) in paper copy blowback from the microfiche.

In the first instance, action usually starts with the Clearinghouses. In the second instance, action starts with EDRS.

(1) Clearinghouse Actions

To request a change, a Clearinghouse should send the Facility, in writing, the following information:

- The **Accession Number** (ED Number) of the document.
- The **Title** of the document (to insure against error in recording the accession number).
- **A copy of the request** from the source to make the change from Level 1 to Level 2, or a statement to the effect that the Clearinghouse has received such a request.
- **A copy of any written communication** from the document source pertaining to the change, or an explanation of the reason for needing the change.

(2) EDRS Actions

From time to time, EDRS discovers microfiche in the system that will not reproduce satisfactorily in paper copy. To fall into this category a significant number of the pages of the document should be illegible upon blowback. Such documents are generally older accessions that were filmed prior to the current evaluation procedures.

When such a document is discovered, EDRS will send Central ERIC, in writing, the following information:

- The Accession Number (ED Number) of the document.
- The Title of the document (to insure against error in recording the number).
- An explanation of the reason that EDRS wants to change the availability of the document.

Central ERIC will evaluate the request. If rejected for any reason, it will be returned to EDRS with an explanation. Approved requests will be properly annotated to this effect and returned to *both* EDRS and the Facility.

Upon receipt back from Central ERIC of an approved request, EDRS will:

- Adjust its order records to indicate that orders for paper copy will not be filled. Orders for paper copy will be returned to the customers with an explanation that they cannot be filled because of the poor quality of the original document.

(3) Facility Actions

Upon receipt of a justified request from a Clearinghouse (based on source's request), the Facility will:

- Verify the existing EDRS Availability Level as it appears on the Resume Master File.
- Schedule required changes to the record for the next backfile correction cycle.
- Inform EDRS, in writing, of the change, providing the information necessary to accomplish the change in its records.
- Keep a permanent file of Level change communications, by ED number.

Upon receipt of an approved EDRS "downgrading" request from Central ERIC, the Facility will perform the first, second, and fourth actions above and will also notify the processing Clearinghouse of the change.

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b. From Level 1 or 2 to Level 3

This change, which is very infrequent, generally occurs when a document has been mistakenly processed at Level 1 or 2 when the source did not intend to authorize such processing. It may also occur if the document is so illegible that even the microfiche copy is unsatisfactory. The actions required are the same as in the procedure for the Level 1 to 2 change described above. Whenever possible, availability from a non-EDRS source should be determined for items becoming Level 3 and should be added to the Availability field during the backfile correction process.

3. Microfiche Header Changes

Microfiche headers exist for the basic purpose of identifying a given fiche. They are not changed with the same readiness that the database is changed unless the error interferes with this basic function.

Corrections should be made to microfiche headers in the following instances:

a. Two microfiche have accidentally switched headers;

b. There is an error in the ED number;

c. Significant displayed data elements (e.g., author's name) are sufficiently in error to either mislead the user or offend the contributor;

d. The microfiche header varies from the data announced in RIE and contained on the ERIC master file. (Such an error is necessarily an EDRS-generated error and should be called to their attention for routine correction.)

Because the information for microfiche headers is produced as a by-product of the processing of the monthly issue, the header normally will reflect the data as announced in RIE. Occasionally, however, an error may be detected after the issue has been forwarded for publication, but *before* the microfiche headers have been produced. If the error is in the data displayed in the header (e.g., page count, author's name, etc.), the single frame resume page and the microfiche header are both corrected, thereby resulting in a minor variance between the microfiche header and the data listed in RIE and on that issue's computer tape. (Backfile changes later correct the master magnetic tapes.)

4. Refilmings

Infrequently, a microfiche is found to contain a defective document (e.g., missing pages or sections, pages mixed up) which makes the item unusable. Usually these situations are reported by EDRS, a microfiche user, or a purchaser of a reproduced paper copy. The following actions are then taken:

a. EDRS contacts the Facility and requests a replacement copy.

b. The Facility attempts to obtain a replacement. If the document was originally received via the Facility (e.g., a Federal agency document), then the Facility Acquisitions Department seeks another copy. If the document originated from a Clearinghouse, the Facility contacts the Clearinghouse and requests another copy.

c. If a replacement copy is provided, the Facility paginates the document and prepares a new Single Frame Resume.

d. A backfile change is prepared and made at the next update to reflect the change in page count.

e. The Facility sends the document to EDRS via Central ERIC, for prior approval of the refilming.

f. EDRS then refilms the document and distributes replacement microfiche to its subscribers.

g. If a replacement document is not available, or when the new corrected microfiche is available, the user reporting the defect is contacted by the ERIC component in contact with that user.

NOTE: REFILMING AND ITS USUAL CONSEQUENCE, REDISTRIBUTION, ARE EXPENSIVE ACTIONS AND REQUIRE THE APPROVAL OF CENTRAL ERIC.

Summary of Post-Publication Change Procedures

Source Requesting Change, e.g., Clearinghouse	ERIC Facility Action	Central ERIC Action	ERIC Document Reproduction Service (EDRS) Action
Send to ERIC Facility: 1. Accession Number (ED/EJ Number) of record requiring change; 2. Title of document/article; 3. Nature of change to be accomplished; 4. Copy of Any Authorization or Written Documentation Supporting/Justifying Change.	1. Check existing record to determine how it currently actually appears on resume master file. 2. Verify that change is needed and evaluate it to see if it is justified (using EPM guidelines) 3. Obtain Central ERIC approval for changes involving refilming by EDRS. Consult with Central ERIC on any controversial changes. 4. Schedule-approved changes into the backfile correction cycle. Eventually make the change to master file. 5. Notify requester of disposition of change request. 6. Notify EDRS of any changes involving Availability Level, EDRS Price, Microfiche Headers, or Refilmings. 7. Keep permanent records pertaining to backfile changes. 8. Include changed record on annual backfile update tapes made available to all tape subscribers.	1. Approve (or deny) requests for refilming put before them by the Facility (or EDRS). 2. "Advise and consent" with Facility on any controversial changes for which Facility seeks Central ERIC approval.	1. Notify Facility of any existing microfiche from which satisfactory blowback cannot be made (for possible change to Level 2 or Level 3). 2. Upon receipt of change information from Facility pertaining to Availability Levels, EDRS Price, Microfiche Headers, or Refilmings, alter EDRS records and files as required, and subsequently fill user requests according to new Level. 3. Refilming Requests A. Refilmings due to EDRS error will be accomplished without cost to ERIC and will be re-distributed to users. B. Refilmings not due to EDRS error, but approved by Central ERIC, will be accomplished and redistributed to users with ERIC billed for agreed-upon change.

FIGURE X-2: SUMMARY OF PROCEDURES FOR POST-PUBLICATION CHANGES

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Appendix A
ERIC Clearinghouse Scope of Interest Guide

April 1991

Educational Resources Information Center (ERIC)
U.S. Department of Education

Introduction

The *ERIC Clearinghouse Scope of Interest Guide* identifies and describes the subject areas covered by the ERIC Clearinghouses. While a specific subject scope area is an integral part of each individual ERIC Clearinghouse contract, this *Guide* makes all of the Clearinghouse scope of interest statements readily available in one document. This *Guide* is published separately and also as Appendix A of the *ERIC Processing Manual.*

Each Clearinghouse scope statement is displayed in the following three-part format:

1. **Formal Statement**
   A comprehensive and detailed description of the scope areas, mainly for use by the ERIC Facility in assigning documents (on the basis of their subject matter) to Clearinghouses for processing, for Clearinghouses in referring documents to other Clearinghouses, and as an aid in indexing a document from the point of view of more than just one Clearinghouse.

2. **Explanatory Notes**
   Supplementary notes that modify, qualify, and explain the formal statement; for use primarily within the ERIC network to ensure that operating staff know of special arrangements for coverage made between or among Clearinghouses.

3. **Brief Statements**
   A summary statement for use in broadly disseminated, system-wide promotional flyers and brochures requiring fairly brief treatment of Clearinghouse scope areas.

Scope of interest statements for each Clearinghouse are followed by an alphabetical listing of subject index terms particularly applicable to that scope. The terms are made up primarily, but not necessarily entirely, of Descriptors from the *ERIC Thesaurus.*

The final section of the *Guide* contains a composite alphabetical listing of all of the applicable subject terms and constitutes, in effect, an overall index to the *Guide*. It is useful in bringing together concepts/terms covered by more than one Clearinghouse, as well as in determining which Clearinghouse covers a particular concept.

In the process of preparing this *Guide*, each Clearinghouse reviewed and updated its own scope of interest statement. The suggested modifications and changes have been edited by the ERIC Facility for length, standardization of format, and the elimination of ambiguity and redundancy. Because the scope of interest statement is an integral part of Clearinghouse contracts, Central ERIC monitors are required to review and approve the final scope statements of each Clearinghouse for which they are responsible.

All significant changes or additions to the scope statements of ERIC Clearinghouses should be reported to the ERIC Facility and the appropriate Clearinghouse monitor.

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Scope of Interest Statements

(By Clearinghouse)

ADULT, CAREER, AND VOCATIONAL EDUCATION (CE)

SCOPE OF INTEREST STATEMENT

The **Scope of Interest Statement** for CE is subdivided into three parts, corresponding to the three parts of the Clearinghouse name, as follows:

I. ADULT EDUCATION

A. *Formal Statement*

Research, theory, and practice related to adult and continuing education in school, institutional, community, and work settings. Includes: adult basic education; adult literacy; workplace literacy; family literacy (when delivered through adult education programs); university and cooperative extension efforts; employer-sponsored training and human resource development; labor/worker education; volunteerism; consumer education; experiential education; military education; veterans' education; distance education (for the delivery of adult education); lifelong learning; educational gerontology (as related to the employment of older workers); community education; community development; self-directed learning; nonformal and informal learning; corrections education; law enforcement and police training; parent education (when delivered through adult education or home economics programs), and professional certification and licensing (except as related to degree programs and professional continuing education, q.v. HE).

B. *Explanatory Notes*

Does *not* include educational programs for adults covered by other Clearinghouse scopes, e.g., staff development activities for teachers (SP), continuing professional education for librarians (IR), university/college faculty development (HE), and so forth.

In the overlap area of *"adult literacy"* (overlapping with CS and LE, q.v.), CE covers specifically literacy training of adults (for whom English is a first language) in order to achieve an employability skill level required for a particular life situation (e.g., occupation, professional skill upgrading, organizational relationship, family, retirement, and so forth), including educational programs (adult, continuing, career, and vocational) for adults needing a higher level of English language proficiency for an adult role than previously obtained. Does not include adult, family, and workplace literacy as it pertains to English-as-a-second-language groups.

C. *Brief Statement*

All levels of adult and continuing education from basic literacy training through professional skill upgrading. The focus is upon factors contributing to the purposeful learning of adults in a variety of life situations usually related to adult roles (e.g., occupation, family, leisure time, citizenship, organizational relationships, retirement, and so forth).

II. CAREER EDUCATION

A. *Formal Statement*

Research, theory, and practice related to career development and career education from preschool through adult, in school, institutional, and business and industry settings. Includes: self-awareness and self-development (as they relate to one's career); career awareness, exploration, decision making, and planning; occupational choice/knowledge and selection of life roles; career change and advancement; work habits and values; job seeking and job coping skills; pay vs. nonpay issues; career education resource centers and information systems; overcoming bias and stereotyping in career choices; parental involvement in career decisions; curriculum infusion (of career education concerns); collaboration of schools with community, business, and industry for career education; and inservice and preservice education for career education.

B. *Explanatory Notes*

Does *not* include career guidance and counseling (covered by CG) or career assessment instruments and career education program evaluation instruments (covered by TM).

C. *Brief Statement*

Career education for all ages and populations in educational, institutional, business, and industry settings. Includes career development programs for achieving self-awareness, career awareness, career choice and decision making, career implementation, and career change and advancement goals. Also includes preservice and inservice education for career development.

III. VOCATIONAL EDUCATION

A. *Formal Statement*

Vocational and technical education at the secondary, postsecondary, and adult levels for the development of skills needed for employment. Occupational areas covered include: agriculture; business and office; allied health occupations (that require less than a baccalaureate degree); home economics; technology education (formerly *"industrial arts"*); trade and industrial; technical; and marketing and distributive. Within scope are materials on curriculum planning and evaluation, dropout prevention, personnel development, and teacher training, as they relate to vocational education. The scope also includes: correctional education; employment and training programs (such as those funded through the Job Training Partnership Act (JTPA)); youth employment; school-to-work transition; job placement and follow-through; occupational psychology and sociology; internships; apprenticeships, on-the-job training; cooperative education; business/industry/education partnerships; entrepreneurship; vocational rehabilitation; and adult retraining.

B. *Explanatory Notes*

Does *not* include nonvocational aspects of education for the handicapped (covered by EC) or nonvocational aspects of education for juvenile offenders (covered by CG).

In the overlap area of vocational/career education for the handicapped/gifted, CE and EC have agreed to the following:

EC will be responsible for documents in this area that are:

- sponsored by the U.S. Office of Special Education and Rehabilitative Services
- sponsored by state departments of special education
- produced by organizations with which EC already has formal acquisitions arrangements (as determined by the *ERIC Acquisitions Arrangements* list).

CE will be responsible for all documents in this area *not* falling under the above criteria.

C. *Brief Statement*

Vocational and technical education for secondary, postsecondary, and adult populations, including all service occupations, corrections education, vocational rehabilitation, employment and training programs, youth employment, work experience programs, education/business/industry partnerships, entrepreneurship, and adult retraining.

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IV. OVERALL CLEARINGHOUSE BRIEF STATEMENT

All levels of adult and continuing education from basic literacy training through professional skill upgrading. Career education and career development programs for all ages and populations in educational, institutional, business, and industry settings. Vocational and technical education covering all service occupations for secondary, postsecondary, and adult populations.

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ADULT, CAREER, AND VOCATIONAL EDUCATION
APPLICABLE TERMS

CE

ACADEMIC ACHIEVEMENT
ACADEMIC EDUCATION
ACADEMIC PERSISTENCE
ACCESS TO EDUCATION
ACCOUNTING
ACQUIRED IMMUNE DEFICIENCY SYNDROME
ADMINISTRATOR EDUCATION
ADULT BASIC EDUCATION
ADULT COUNSELING
ADULT DAY CARE
ADULT DEVELOPMENT
ADULT DROPOUTS
ADULT EDUCATION
ADULT EDUCATORS
ADULT FARMER EDUCATION
ADULT FOSTER CARE
ADULT LEARNING
ADULT LITERACY
ADULT PROGRAMS
ADULT READING PROGRAMS
ADULT STUDENTS
ADULT VOCATIONAL EDUCATION
ADULTS
AGE DISCRIMINATION
AGENCY COOPERATION
AGING (INDIVIDUALS)
AGING EDUCATION
AGRIBUSINESS
AGRICULTURAL COLLEGES
AGRICULTURAL EDUCATION
AGRICULTURAL ENGINEERING
AGRICULTURAL LABORERS
AGRICULTURAL MACHINERY
AGRICULTURAL MACHINERY OCCUPATIONS
AGRICULTURAL OCCUPATIONS
AGRICULTURAL PERSONNEL
AGRICULTURAL PRODUCTION
AGRICULTURAL SAFETY
AGRICULTURAL SKILLS
AGRICULTURAL TECHNICIANS
AGRICULTURAL TRENDS
AGRICULTURE
AIR CONDITIONING
AIR TRAFFIC CONTROL
AIRCRAFT PILOTS
ALLIED HEALTH OCCUPATIONS
ALLIED HEALTH OCCUPATIONS EDUCATION
ALLIED HEALTH PERSONNEL
ANDRAGOGY
ANIMAL HUSBANDRY
APPLIANCE REPAIR
APPRENTICESHIPS
ARMED FORCES
ARTICULATION (EDUCATION)
ASSESSMENT CENTERS (PERSONNEL)
ATTITUDES
AUTO BODY REPAIRERS
AUTO MECHANICS
AUTO PARTS CLERKS

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BASIC BUSINESS EDUCATION
BASIC SKILLS
BLACK EMPLOYMENT
BLUE COLLAR OCCUPATIONS
BOOKKEEPING
BRICKLAYING
BUILDING TRADES
BUSINESS
BUSINESS CORRESPONDENCE
BUSINESS EDUCATION
BUSINESS EDUCATION TEACHERS
BUSINESS RESPONSIBILITY
BUSINESS SKILLS

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CAREER AWARENESS
CAREER CHANGE
CAREER CHOICE
CAREER COUNSELING
CAREER DEVELOPMENT
CAREER EDUCATION
CAREER EXPLORATION
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ECONOMIC DEVELOPMENT
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EDUCATION WORK RELATIONSHIP
EDUCATIONAL ADMINISTRATION

CE

ADULT, CAREER, AND VOCATIONAL EDUCATION

APPLICABLE TERMS

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EDUCATIONAL BACKGROUND
EDUCATIONAL BENEFITS
EDUCATIONAL CERTIFICATES
EDUCATIONAL DEMAND
EDUCATIONAL GERONTOLOGY
EDUCATIONAL IMPROVEMENT
EDUCATIONAL INNOVATION
EDUCATIONAL LEGISLATION
EDUCATIONAL NEEDS
EDUCATIONAL PLANNING
EDUCATIONAL RESEARCHERS
EDUCATIONALLY DISADVANTAGED
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EMPLOYEE ASSISTANCE PROGRAMS
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EMPLOYMENT INTERVIEWS
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EXTENSION EDUCATION
EXTERNAL DEGREE PROGRAMS

FAMILY INFLUENCE
FAMILY LIFE
FAMILY LIFE EDUCATION
FAMILY PROGRAMS
FARM LABOR
FARM MANAGEMENT
FARM OCCUPATIONS
FARM VISITS
FARMERS
FASHION INDUSTRY
FEDERAL AID
FEDERAL PROGRAMS
FINANCE OCCUPATIONS
FIRE FIGHTERS
FLEXIBLE WORKING HOURS
FOLK SCHOOLS
FOLLOWUP STUDIES
FOOD SERVICE
FOODS INSTRUCTION
FOREIGN WORKERS
FRINGE BENEFITS
FUNCTIONAL LITERACY
FUNCTIONAL READING
FUTURES (OF SOCIETY)

GENERAL EDUCATION
GERONTOLOGY
GOVERNMENT EMPLOYEES
GRAPHIC ARTS
GROUNDS KEEPERS

HEADS OF HOUSEHOLDS
HEALTH OCCUPATIONS
HEALTH PERSONNEL
HEATING
HIGH RISK STUDENTS
HIGH SCHOOL EQUIVALENCY PROGRAMS
HOME ECONOMICS
HOME ECONOMICS EDUCATION
HOME ECONOMICS TEACHERS
HOME STUDY
HOMEMAKERS
HORTICULTURE
HOSPITAL PERSONNEL
HOSPITALITY OCCUPATIONS
HOUSEHOLD WORKERS
HUMAN SERVICES

ILLITERACY
INCOME
INDEPENDENT STUDY
INDIVIDUALIZED INSTRUCTION
INDUSTRIAL ARTS
INDUSTRIAL ARTS TEACHERS
INDUSTRIAL EDUCATION
INDUSTRIAL PERSONNEL
INDUSTRIAL PSYCHOLOGY
INDUSTRIAL TRAINING
INDUSTRY
INPLANT PROGRAMS
INSERVICE EDUCATION
INSERVICE TEACHER EDUCATION
INSTITUTES (TRAINING PROGRAMS)
INSTRUCTOR COORDINATORS
INTEGRATED CURRICULUM
INTERESTS
INTERGENERATIONAL PROGRAMS
INTERPERSONAL COMPETENCE
INTERPERSONAL RELATIONSHIP

JOB ANALYSIS
JOB APPLICANTS
JOB APPLICATION
JOB DEVELOPMENT
JOB ENRICHMENT
JOB LAYOFF
JOB PERFORMANCE
JOB PLACEMENT
JOB SATISFACTION
JOB SEARCH METHODS
JOB SHARING
JOB SIMPLIFICATION
JOB SKILLS
JOB TRAINING

KEYBOARDING (DATA ENTRY)
KNOWLEDGE LEVEL

LABOR CONDITIONS
LABOR DEMANDS
LABOR ECONOMICS
LABOR EDUCATION
LABOR FORCE
LABOR FORCE DEVELOPMENT
LABOR LEGISLATION
LABOR MARKET
LABOR NEEDS
LABOR PROBLEMS
LABOR RELATIONS
LABOR SUPPLY
LABOR TURNOVER
LABOR UTILIZATION
LABORERS
LAUNDRY DRYCLEANING OCCUPATIONS
LAW ENFORCEMENT
LEADERSHIP TRAINING
LEARNING LABORATORIES
LEARNING MOTIVATION
LEARNING PROCESSES
LECTURE METHOD
LEISURE TIME
LIFELONG LEARNING

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ADULT, CAREER, AND VOCATIONAL EDUCATION
APPLICABLE TERMS
CE

LITERACY
LITERACY EDUCATION

MACHINE REPAIRERS
MACHINE TOOL OPERATORS
MACHINISTS
MANAGEMENT DEVELOPMENT
MANUFACTURING INDUSTRY
MARKETING
MECHANICS (PROCESS)
MENTAL HEALTH
MENTORS
MERCHANDISING
MERIT PAY
METAL INDUSTRY
METAL WORKING
MIDDLE AGED ADULTS
MIDLIFE TRANSITIONS
MIGRANT ADULT EDUCATION
MIGRANT EMPLOYMENT
MIGRANT WORKERS
MILITARY PERSONNEL
MILITARY TRAINING
MINORITY GROUPS
MOTOR VEHICLES
MULTIPLE EMPLOYMENT

NEEDS ASSESSMENT
NONCOLLEGE BOUND STUDENTS
NONCREDIT COURSES
NONFORMAL EDUCATION
NONPROFESSIONAL PERSONNEL
NONTRADITIONAL EDUCATION
NONTRADITIONAL OCCUPATIONS
NONTRADITIONAL STUDENTS
NUCLEAR POWER PLANT TECHNICIANS
NURSE PRACTITIONERS
NURSES
NURSES AIDES
NURSING
NURSING EDUCATION
NUTRITION INSTRUCTION

OCCUPATIONAL ASPIRATION
OCCUPATIONAL CLUSTERS
OCCUPATIONAL HOME ECONOMICS
OCCUPATIONAL INFORMATION
OCCUPATIONAL MOBILITY
OCCUPATIONAL SAFETY AND HEALTH
OCCUPATIONAL SURVEYS
OCCUPATIONAL TESTS
OCCUPATIONAL THERAPY
OCCUPATIONS
OFF FARM AGRICULTURAL OCCUPATIONS
OFF THE JOB TRAINING
OFFICE AUTOMATION
OFFICE MACHINES
OFFICE OCCUPATIONS
OFFICE OCCUPATIONS EDUCATION
OFFICE PRACTICE
OFFICER PERSONNEL
OLDER ADULTS
ON THE JOB TRAINING
ORGANIZATIONAL DEVELOPMENT
ORNAMENTAL HORTICULTURE
OUTCOMES OF EDUCATION
OUTPLACEMENT SERVICES (EMPLOYMENT)
OUTREACH PROGRAMS
OVERSEAS EMPLOYMENT

PARAPROFESSIONAL PERSONNEL
PARENT ATTITUDES
PARENT EDUCATION
PARENT PARTICIPATION
PARENTHOOD EDUCATION
PARENTS
PART TIME EMPLOYMENT
PART TIME STUDENTS
PARTICIPANT CHARACTERISTICS
PARTICIPANT SATISFACTION
PARTICIPATION
PARTICIPATIVE DECISION MAKING
PARTICIPATORY RESEARCH
PATIENT EDUCATION
PERSONNEL EVALUATION
PERSONNEL POLICY
PERSONNEL SELECTION
PHYSICAL THERAPY
POLICE
POLICE COMMUNITY RELATIONSHIP
POLICE EDUCATION
POLICY FORMATION
POSTSECONDARY EDUCATION
PRACTICAL NURSING
PRERETIREMENT EDUCATION
PREVOCATIONAL EDUCATION
PRODUCTIVITY
PROFESSIONAL CONTINUING EDUCATION
PROFESSIONAL DEVELOPMENT
PROFESSIONAL PERSONNEL
PROFESSIONAL TRAINING
PROGRAM ADMINISTRATION
PROGRAM CONTENT
PROGRAM DEVELOPMENT
PROGRAM EFFECTIVENESS
PROGRAM EVALUATION
PROGRAM IMPLEMENTATION
PROGRAM IMPROVEMENT
PROMOTION (OCCUPATIONAL)
PROPRIETARY SCHOOLS
PSYCHOLOGICAL NEEDS
PUBLIC AFFAIRS EDUCATION
PUBLIC SCHOOL ADULT EDUCATION

QUALITY CIRCLES
QUALITY CONTROL
QUALITY OF LIFE
QUALITY OF WORKING LIFE

READING INSTRUCTION
RECRUITMENT
REENTRY STUDENTS
REENTRY WORKERS
REMEDIAL INSTRUCTION
RESEARCH COORDINATING UNITS
RESIDENTIAL PROGRAMS
RESOURCE CENTERS
RESUMES (PERSONAL)
RETAILING
RETIREMENT
RETIREMENT BENEFITS
RETRAINING
ROBOTICS
ROLE CONFLICT
ROLE PERCEPTION
RURAL DEVELOPMENT
RURAL EXTENSION

SAFETY EDUCATION
SALARY WAGE DIFFERENTIALS
SALES OCCUPATIONS
SCHOOL BUSINESS RELATIONSHIP
SECRETARIES
SELF EMPLOYMENT
SEMISKILLED OCCUPATIONS
SENSITIVITY TRAINING
SERVICE OCCUPATIONS
SEX DISCRIMINATION
SEX FAIRNESS
SEX ROLE
SHELTERED WORKSHOPS
SHORTHAND
SKILL DEVELOPMENT
SKILLED OCCUPATIONS
SKILLED WORKERS
SMALL BUSINESSES
SMALL ENGINE MECHANICS
SOCIAL CHANGE
SOCIAL PROBLEMS
SOCIAL WORKERS
SPECIAL DEGREE PROGRAMS
SPECIAL NEEDS STUDENTS
STAFF DEVELOPMENT
STATE AGENCIES
STATE STANDARDS
STATE SURVEYS
STOPOUTS
STRESS MANAGEMENT
STRUCTURAL UNEMPLOYMENT
STUDENT ATTITUDES

ADULT, CAREER, AND VOCATIONAL EDUCATION
APPLICABLE TERMS

STUDENT CERTIFICATION
STUDENT EMPLOYMENT
STUDENT MOTIVATION
STUDENT NEEDS
STUDENT RECRUITMENT
SUBCULTURES
SUPERVISED OCCUPATIONAL EXPERIENCE (AGRICULTURE)
SUPERVISORS
SUPERVISORY TRAINING
SURVEYS

TASK ANALYSIS
TEACHING METHODS
TECHNICAL EDUCATION
TECHNICAL INSTITUTES
TECHNICAL OCCUPATIONS
TECHNOLOGICAL ADVANCEMENT
TECHNOLOGICAL LITERACY
TECHNOLOGY EDUCATION
TESTING
TOOL AND DIE MAKERS
TRADE AND INDUSTRIAL EDUCATION
TRADE AND INDUSTRIAL TEACHERS
TRAINEES
TRAINERS
TRAINING
TRAINING ALLOWANCES
TRAINING METHODS
TRAINING OBJECTIVES
TRANSFER OF TRAINING
TYPEWRITING

UNDEREMPLOYMENT
UNEMPLOYMENT
UNIONS
UNSKILLED OCCUPATIONS
UNSKILLED WORKERS
URBAN AREAS
URBAN EXTENSION

VETERANS
VETERANS EDUCATION
VOCATIONAL ADJUSTMENT
VOCATIONAL APTITUDE
VOCATIONAL DIRECTORS
VOCATIONAL EDUCATION
VOCATIONAL EDUCATION TEACHERS
VOCATIONAL ENGLISH (SECOND LANGUAGE)
VOCATIONAL EVALUATION
VOCATIONAL FOLLOWUP
VOCATIONAL INTERESTS
VOCATIONAL MATURITY
VOCATIONAL REHABILITATION
VOCATIONAL SCHOOLS
VOCATIONAL TRAINING CENTERS

VOLUNTARY AGENCIES
VOLUNTEER TRAINING
VOLUNTEERS

WEEKEND PROGRAMS
WELDING
WELFARE RECIPIENTS
WHITE COLLAR OCCUPATIONS
WOODWORKING
WORD PROCESSING
WORK ATTITUDES
WORK ENVIRONMENT
WORK ETHIC
WORK EXPERIENCE
WORK EXPERIENCE PROGRAMS
WORK STUDY PROGRAMS
WORKERS COMPENSATION
WORKING CLASS
WORKING HOURS
WORKPLACE LITERACY
WORKSHOPS

YOUNG ADULTS
YOUNG FARMER EDUCATION
YOUTH CLUBS
YOUTH EMPLOYMENT
YOUTH OPPORTUNITIES
YOUTH PROGRAMS

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COUNSELING AND PERSONNEL SERVICES (CG)

SCOPE OF INTEREST STATEMENT

A. FORMAL STATEMENT

1. *General*

- Preparation, practice, supervision, and evaluation of counselors, student affairs personnel, and other helping specialists at all educational levels and in all settings.
- Counseling, guidance, and personnel services available in educational, rehabilitation, military, employment, and community settings.
- Counseling and guidance program development, implementation, and evaluation.
- Career counseling, career guidance, and career development programs at all levels and settings.
- Ethical issues, certification, licensure, and other legal matters relating to the field of counseling and guidance.
- Use and results of personnel practices such as testing, interviewing, information dissemination, and data analysis.
- Multicultural, minority, and gender-focused counseling and development programs.
- Student development and student affairs in colleges and universities.
- Adult development, transitions, and aging (including gerontology).

2. *Counseling and guidance services in the following specific areas:*

- Aging, grief, and dying;
- Alcohol and drug education;
- College-level career planning and placement;
- Consultation with students, families, educators, and professionals;
- Counseling for learning and study skills;
- Dropout identification, prevention, and rehabilitation;
- Eating disorders (anorexia nervosa, bulimia);
- Educational, career, and life planning;
- Employability skills;
- Family life, divorce, remarriage, stepfamilies, one-parent families;
- Group counseling, group therapy, and group dynamics (group process); and
- Marriage and family counseling;
- Mental health counseling;
- Mid-life career changes;

- Pre-college counseling and advising;
- School transitions;
- Self-esteem;
- Self-exploration and human potential issues;
- Sexual stereotyping, discrimination, harassment, and exploitation;
- Suicide and self-destructive behaviors.

3. *Counseling and guidance services with the following specific populations, e.g.,*

- Alcohol and Drug Abusers;
- Elementary, Middle, Junior High, High School, and College Students;
- Family Caregivers;
- Handicapped Persons;
- Institutionalized Persons;
- Juvenile Delinquents;
- Minorities;
- Older Adults;
- Persons with Aids;
- Pregnant Teenagers and Teenage Parents;
- Public Offenders;
- Runaways;
- Veterans;
- Victims of Child Abuse, Sexual Abuse, or Domestic Violence;
- Women.

B. EXPLANATORY NOTES

Psychological testing for counseling purposes is of interest, but overlaps with the TM Clearinghouse. Practice has been to direct documents containing actual testing instruments (or which are strongly oriented toward mathematical analysis of tests) to the TM Clearinghouse. Applications of computer technology specifically to guidance and counseling are in scope; other educational technology-oriented documents may be more appropriate for the IR Clearinghouse. Articles dealing with career guidance or career counseling are processed by CG; other areas of career education and vocational education are directed to the CE Clearinghouse.

C. BRIEF STATEMENT

Preparation, practice, and supervision of counselors at all educational levels and in all settings. Theoretical development of counseling and guidance, including the nature of relevant human characteristics. Use and results of personnel practices and procedures. Group process (counseling, therapy, dynamics) and case work.

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COUNSELING AND PERSONNEL SERVICES
APPLICABLE TERMS
CG

ABORTIONS
ACADEMIC ASPIRATION
ACHIEVEMENT NEED
ACQUIRED IMMUNE DEFICIENCY SYNDROME
ADJUSTMENT (TO ENVIRONMENT)
ADOLESCENT DEVELOPMENT
ADOLESCENTS
ADULT COUNSELING
ADULT DEVELOPMENT
AFFECTIVE BEHAVIOR
AGE DIFFERENCES
AGE DISCRIMINATION
AGGRESSION
AGING (INDIVIDUALS)
ALCOHOL ABUSE
ALCOHOL EDUCATION
ALCOHOLISM
ALIENATION
ALZHEIMERS DISEASE
ANDROGYNY
ANOREXIA NERVOSA
ANXIETY
ATTITUDE CHANGE

BATTERED WOMEN
BEHAVIOR CHANGE
BEHAVIOR MODIFICATION
BEHAVIOR PATTERNS
BIBLIOTHERAPY
BODY IMAGE
BULIMIA
BURNOUT

CAREER AWARENESS
CAREER CHANGE
CAREER CHOICE
CAREER COUNSELING
CAREER DEVELOPMENT
CAREER EXPLORATION
CAREER GUIDANCE
CAREER PLANNING
CAREGIVERS
CHANGE AGENTS
CHANGE STRATEGIES
CHILD ABUSE
CHILD NEGLECT
CHILD SUPPORT
CHILDLESSNESS
CHRONIC ILLNESS
CLASSROOM ENVIRONMENT
CLIENT CHARACTERISTICS (HUMAN SERVICES)
COCAINE
COCOUNSELING
COGNITIVE STYLE
COHABITATION
COLLEGE BOUND STUDENTS
COLLEGE CHOICE
COLLEGE ENVIRONMENT
CONFIDENTIALITY
CONFLICT RESOLUTION
CONGRUENCE (PSYCHOLOGY)
CONSULTANTS
CONTRACEPTION
COPING
CORRECTIONAL INSTITUTIONS
CORRECTIONAL REHABILITATION
COUNSELING
COUNSELING EFFECTIVENESS
COUNSELING OBJECTIVES
COUNSELING SERVICES
COUNSELING TECHNIQUES
COUNSELING THEORIES
COUNSELOR ATTITUDES
COUNSELOR CERTIFICATION
COUNSELOR CHARACTERISTICS
COUNSELOR CLIENT RELATIONSHIP
COUNSELOR EDUCATORS
COUNSELOR EVALUATION
COUNSELOR PERFORMANCE
COUNSELOR QUALIFICATIONS
COUNSELOR ROLE
COUNSELOR SELECTION
COUNSELOR TEACHER COOPERATION
COUNSELOR TRAINING
COUNSELORS
CRIME
CRIME PREVENTION
CRIMINALS
CRISIS INTERVENTION
CROSS CULTURAL STUDIES

DEATH
DELINQUENCY
DELINQUENCY CAUSES
DELINQUENCY PREVENTION
DELINQUENT BEHAVIOR
DELINQUENT REHABILITATION
DEPRESSION (PSYCHOLOGY)
DISCLOSURE
DISPLACED HOMEMAKERS
DIVORCE
DRINKING
DRIVING WHILE INTOXICATED
DROPOUT ATTITUDES
DROPOUT CHARACTERISTICS
DROPOUT PREVENTION
DROPOUT PROGRAMS
DROPOUTS
DRUG ABUSE
DRUG ADDICTION
DRUG EDUCATION
DRUG REHABILITATION
DRUG THERAPY
DRUG USE
DUAL CAREER FAMILY

EARLY PARENTHOOD
EMOTIONAL ADJUSTMENT
EMOTIONAL DEVELOPMENT
EMOTIONAL PROBLEMS
EMOTIONAL RESPONSE
EMPATHY
EMPLOYED PARENTS
EMPLOYED WOMEN
EMPLOYMENT COUNSELORS
EMPLOYMENT POTENTIAL
EQUAL EDUCATION
EQUAL OPPORTUNITIES (JOBS)
EQUAL PROTECTION
ETHNICITY

FAMILY ATTITUDES
FAMILE CAREGIVERS
FAMILY COUNSELING
FAMILY STRUCTURE
FEMINISM
FRAIL ELDERLY
FUTURES (OF SOCIETY)

GERIATRICS
GERONTOLOGY
GRIEF
GROUP COUNSELING
GROUP DYNAMICS
GROUP GUIDANCE
GROUP THERAPY
GUIDANCE
GUIDANCE CENTERS
GUIDANCE OBJECTIVES
GUIDANCE PERSONNEL
GUIDANCE PROGRAMS

HEALTH CARE COSTS
HEALTH PROMOTION
HELP SEEKING
HELPING RELATIONSHIP
HELPLESSNESS
HIGH RISK PERSONS
HIGH RISK STUDENTS
HOMOSEXUALITY
HOSTILITY
HUMAN RELATIONS
HUMAN SERVICES

ILLEGAL DRUG USE
INDEPENDENT LIVING
INDIVIDUAL CHARACTERISTICS
INDIVIDUAL COUNSELING
INDIVIDUAL NEEDS
INDIVIDUAL POWER
INDIVIDUAL PSYCHOLOGY
INTERPERSONAL ATTRACTION
INTERPERSONAL COMMUNICATION
INTERPERSONAL COMPETENCE
INTERPERSONAL RELATIONSHIP
INTERVIEWS
INTIMACY

JOB APPLICANTS
JOB PERFORMANCE
JOB PLACEMENT

CG

COUNSELING AND PERSONNEL SERVICES
APPLICABLE TERMS

JOB SATISFACTION
JOB SEARCH METHODS
JUVENILE COURTS
JUVENILE GANGS

LEADERSHIP
LEADERSHIP QUALITIES
LEADERSHIP RESPONSIBILITY
LEADERSHIP STYLES
LIFE EVENTS
LIFE SATISFACTION
LIFE STYLE
LOCUS OF CONTROL
LONELINESS
LONG TERM CARE

MARIJUANA
MARITAL INSTABILITY
MEMORY
MENTAL HEALTH
METACOGNITION
MICROCOUNSELING
MODELING (PSYCHOLOGY)
MORAL DEVELOPMENT
MORAL VALUES
MORALE
MOTIVATION

NEEDS
NEEDS ASSESSMENT
NONCOLLEGE BOUND STUDENTS
NONDIRECTIVE COUNSELING
NONTRADITIONAL OCCUPATIONS
NONTRADITIONAL STUDENTS
NUCLEAR FAMILY

OBESITY
OCCUPATIONAL ASPIRATION
OCCUPATIONAL INFORMATION
OLD OLD ADULTS
OLDER ADULTS
OVERACHIEVEMENT

PARENT ASPIRATION
PARENT CHILD RELATIONSHIP
PARENT COUNSELING
PARENT INFLUENCE
PARENT RESPONSIBILITY
PARENT ROLE
PEER ACCEPTANCE
PEER COUNSELING
PEER EVALUATION
PEER GROUPS
PEER INFLUENCE
PEER RELATIONSHIP
PERSONALITY ASSESSMENT
PERSONALITY CHANGE
PERSONALITY DEVELOPMENT
PERSONALITY PROBELMS
PERSONALITY TRAITS
PERSONNEL SELECTION
PLACEMENT

PRACTICUM SUPERVISION
PREGNANT STUDENTS
PREVENTION
PRISONERS
PROBLEM CHILDREN
PROSOCIAL BEHAVIOR
PSYCHIATRY
PSYCHOLOGICAL
  CHARACTERISTICS
PSYCHOLOGICAL EVALUATION
PSYCHOLOGICAL NEEDS
PSYCHOLOGICAL PATTERNS
PSYCHOLOGICAL SERVICES
PSYCHOLOGICAL STUDIES
PSYCHOTHERAPY
PUPIL PERSONNEL SERVICES
PUPIL PERSONNEL WORKERS

QUALITY OF LIFE

RACIAL ATTITUDES
RACIAL DIFFERENCES
RACIAL DISCRIMINATION
RAPE
RATIONAL EMOTIVE THERAPY
RECALL (PSYCHOLOGY)
RECIDIVISM
RECOGNITION (PSYCHOLOGY)
REHABILITATION COUNSELING
REJECTION (PSYCHOLOGY)
RELAXATION TRAINING
REMARRIAGE
RESIDENT ASSISTANTS
RETENTION (PSYCHOLOGY)
RETIREMENT
ROLE CONFLICT
ROLE PERCEPTION
ROLE PLAYING
ROLE THEORY
RUNAWAYS

SCHOOL COUNSELING
SCHOOL COUNSELORS
SCHOOL GUIDANCE
SCHOOL PSYCHOLOGISTS
SCHOOL SOCIAL WORKERS
SELF ACTUALIZATION
SELF CONCEPT
SELF CONGRUENCE
SELF CONTROL
SELF EFFICACY
SELF ESTEEM
SELF EVALUATION (INDIVIDUALS)
SEX BIAS
SEX DIFFERENCES
SEX DISCRIMINATION
SEX FAIRNESS
SEX ROLE
SEX STEREOTYPES
SEXUALITY
SIBLINGS
SMOKING

SOCIAL ADJUSTMENT
SOCIAL BEHAVIOR
SOCIAL COGNITION
SOCIAL EXCHANGE THEORY
SOCIAL ISOLATION
SOCIAL PSYCHOLOGY
SOCIAL SUPPORT GROUPS
SOCIAL WORKERS
SOCIALIZATION
SPOUSES
STATUS NEED
STRESS VARIABLES
STUDENT ADJUSTMENT
STUDENT ALIENATION
STUDENT PERSONNEL SERVICES
STUDENT PERSONNEL WORKERS
STUDENT RIGHTS
STUDENT WELFARE
SUICIDE

TERMINAL ILLNESS
THERAPEUTIC ENVIRONMENT

VALUE JUDGMENT
VALUES
VALUES CLARIFICATION
VICTIMS OF CRIME
VIOLENCE
VOCATIONAL INTERESTS
VOCATIONAL REHABILITATION

WIDOWED
WITHDRAWAL (PSYCHOLOGY)
WOMENS STUDIES

YOUNG OLD ADULTS
YOUTH PROBLEMS

READING AND COMMUNICATION SKILLS (CS)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

All aspects of communication skills in English as a first language--reading, writing, speaking, and listening--how they are interrelated, and how they are taught, kindergarten through adult. Includes:

- **Reading**
  The nature of reading and how it is taught, including research on psycholinguistic and sociolinguistic aspects of reading, cognitive and linguistic development in reading, reading instruction methods and materials, clinical and remedial strategies for overcoming reading problems, and the application of reading skills to subject-matter learning, functional reading or literacy, and reading for enjoyment. Includes *"family literacy"* (i.e., adults and their children working together on reading, writing, and speaking to improve the literacy of the entire family) and the study of literature in the school curriculum. Includes all aspects of reading behavior (with emphasis on physiology, psychology, and sociology), instructional materials, curricula, tests/measurement, methodology, and the role of libraries and other agencies in fostering and guiding reading.

- **English**
  Teaching of the English language to native speakers, including grammar, punctuation, syntax, semantics, etc. Includes the study of English and American literature, and literature translated into English from other languages.

- **Writing**
  Development of and instruction in writing abilities, including research on the nature of these abilities and their acquisition. Includes: (1) writing as a series of composing and revising processes: pre-writing activities, drafting, revising, editing, and producing final copy; (2) the nature of and instruction in creative writing; (3) the acquisition and remediation of functional writing skills, i.e., writing as an aspect of literacy. Includes research and instruction on spelling (invented and standard), writing across the curriculum, and *"writing to learn."*

- **Literacy**
  Literacy in English *as a first language*. Literacy concerns of the normal K-college educational track and of adults working with their children (sometimes called *"family literacy"* or *"intergenerational literacy"*). The teaching of reading and writing in English to kindergarten through adult students of *normal proficiency*, for whom English is their native language. Includes diagnostic services and remedial strategies for overcoming problems blocking proficiency in such students. NOTE: *"Literacy education"* is often used in the literature to mean *"reading and writing education."*

- **Communication**
  Development of and instruction in speaking and listening abilities, including interaction in social, instructional, public, and organizational settings. Includes interpersonal and small group communication, speech sciences, communication development, public address and rhetorical skills (including forensics), theater and drama, creative dramatics, oral interpretation, storytelling, and communication education. Also includes intrapersonal communication, nonverbal communication, and the communication aspects of public relations.

- **Mass Communication**
  Journalism education; educational applications of electronic media; teaching and learning consumer-oriented skills for using print and non-print media.

II. EXPLANATORY NOTES

- **Family and Intergenerational Literacy**
  CS covers documents relating to adults working with their children (or grandchildren) who are in grades K-12, on reading, writing, speaking, and listening. Documents relating to parents helping their preschool children will be transferred to PS, and those relating to adults working on basic skills for their own purposes will be transferred to CE.

- **Educational Media and Mass Communication**
  IR is responsible for documents concerning educational media, including the development of educational technology. CS deals with the use of commercially-developed mass media (such as films, TV programs, and radio broadcasts or tapes) in an educational setting. If the primary focus of the document is the *means* for delivering information (computers, for instance, or the production of a film), the document is within the scope of IR; if the primary focus is on the *content* of the TV program or film and its application to education, the document belongs within the CS scope.

- **Role of Libraries**
  IR deals with all aspects of libraries, their organization and management, as well as their programs and services. CS deals with fostering and guiding reading and writing and promoting literacy and literature for students in kindergarten through college. PS is concerned with promoting books and listening and reading for preschool children. Documents dealing with literacy programs in library settings *may* overlap the interests of all three Clearinghouses. In such cases, the principal focus of the document must be determined, e.g., preschool children (PS); libraries and their programs (IR); reading, writing, literacy (CS) and this in turn will decide the proper assignment.

- **Preschool Kindergarten, and Primary Grades**
  Documents dealing with preschool children will be transferred to PS, as well as all documents dealing with general early childhood issues; however, those documents having to do specifically with reading and writing in kindergarten and the early grades will be processed by CS.

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III. BRIEF STATEMENT

Reading and writing, English (as a first language), and communications skills (verbal and nonverbal), kindergarten through college. Includes family or intergenerational literacy, i.e., adults working with their children. Research and instructional development in reading, writing, speaking, and listening. Identification, diagnosis, and remediation of reading problems. Speech communication (including forensics), mass communication (including journalism), interpersonal and small group interaction, oral interpretation, rhetorical and communication theory, and theater/drama. Includes all aspects of reading behavior, with emphasis on: (1) physiology, psychology, and sociology; (2) instructional materials, curricula, teaching methodology, and tests/measurement; and (3) the role of libraries and other agencies in fostering and guiding reading. Preparation of instructional staff and related personnel in all the above areas.

READING AND COMMUNICATION SKILLS
APPLICABLE TERMS

CS

ACADEMIC DISCOURSE
ACTING
ADOLESCENT LITERATURE
ADULT BASIC EDUCATION
ADULT EDUCATION
ADULT LITERACY
ADULT READING PROGRAMS
ADVANCE ORGANIZERS
ADVERTISING
AUDIENCE ANALYSIS
AUDIENCE AWARENESS
AUDIENCE RESPONSE
AUDIENCES

BASAL READING
BASIC WRITERS
BASIC WRITING
BEGINNING READING
BEGINNING WRITING
BLACK LITERATURE
BUSINESS COMMUNICATION
BUSINESS CORRESPONDENCE

CENSORSHIP
CHILDRENS LITERATURE
CHILDRENS TELEVISION
CHILDRENS WRITING
CHORAL SPEAKING
CLASSROOM COMMUNICATION
CLOZE PROCEDURE
COHESION (WRITTEN COMPOSITION)
COLLABORATIVE WRITING
COLLEGE ENGLISH
COMMERCIAL TELEVISION
COMMUNICATION (THOUGHT TRANSFER)
COMMUNICATION APPREHENSION
COMMUNICATION BEHAVIOR
COMMUNICATION CONTEXT
COMMUNICATION DISORDERS
COMMUNICATION PATTERNS
COMMUNICATION PROBLEMS
COMMUNICATION RESEARCH
COMMUNICATION SKILLS
COMMUNICATION STRATEGIES
COMMUNICATION, VERBAL
COMPOSITION THEORY
CONFLICT RESOLUTION
CONTENT AREA READING
CONTENT AREA WRITING
CONTEXT CLUES
CONVERSATIONAL MANAGEMENT
CORRECTIVE READING
CREATIVE DRAMATICS
CREATIVE THINKING
CREATIVE WRITING
CRITICAL READING
CRITICAL THINKING
CRITICAL VIEWING
CULTURAL AWARENESS
CULTURAL BACKGROUND
CULTURAL CONTEXT
CULTURAL DIFFERENCES
CULTURAL INTERRELATIONSHIPS
CULTURAL LITERACY
CULTURAL PLURALISM
CULTURAL SENSITIVITY
CURSIVE WRITING

DANCE
DEBATE
DEBATE FORMAT
DEBATE STRATEGIES
DEBATE THEORY
DEBATE TOURNAMENTS
DECISION MAKING
DECISION MAKING SKILLS
DECODING (READING)
DESCRIPTIVE WRITING
DIALOGUE JOURNALS
DIFFUSION (COMMUNICATION)
DIRECTED READING ACTIVITY
DISCOURSE ANALYSIS
DISCOURSE MODES
DISCOURSE ORGANIZATION
DRAMA
DRAMA WORKSHOPS
DRAMATIC PLAY
DRAMATICS
DYSLEXIA

EARLY READING
EDITING
EDITORIALS
EDITORS
EIGHTEENTH CENTURY LITERATURE
EMOTIONAL RESPONSE
ENGLISH
ENGLISH CURRICULUM
ENGLISH DEPARTMENTS
ENGLISH INSTRUCTION
ENGLISH LITERATURE
EXPOSITORY WRITING
EXTRAVERSION INTROVERSION

FABLES
FEEDBACK
FEMALES
FEMINISM
FEMINIST CRITICISM
FICTION
FIGURATIVE LANGUAGE
FILM CRITICISM
FILM INDUSTRY
FILM PRODUCTION
FILM STUDY
FILMS
FOLK CULTURE
FOLKLORE
FOLKTALES
FREEDOM OF SPEECH
FRENCH LITERATURE
FRESHMAN COMPOSITION
FUNCTIONAL LITERACY
FUNCTIONAL READING

GERMAN LITERATURE
GRAPHIC ORGANIZERS
GREEK LITERATURE
GROUP DYNAMICS

HANDWRITING
HEALTH COMMUNICATION
HIGH INTEREST LOW VOCABULARY
HISPANIC AMERICAN LITERATURE
HISTORICAL RHETORIC
HUMAN RELATIONS
HUMANITIES
HUMANITIES INSTRUCTION

IDENTIFICATION (PSYCHOLOGY)
ILLITERACY
INDEPENDENT READING
INDIVIDUALIZED READING
INFERENCES
INFORMAL READING INVENTORIES
INTERACTION
INTERCULTURAL COMMUNICATION
INTERGROUP RELATIONS
INTERPERSONAL ATTRACTION
INTERPERSONAL COMMUNICATION
INTERPERSONAL COMPETENCE
INTERPERSONAL RELATIONSHIP
INTERVIEWS
INVENTED SPELLING
INTIMACY
ITALIAN LITERATURE

JEALOUSY
JOURNAL WRITING
JOURNALISM
JOURNALISM EDUCATION
JOURNALISM HISTORY
JOURNALISM RESEARCH

LABOR RELATIONS
LANGUAGE ARTS
LANGUAGE EXPERIENCE APPROACH
LANGUAGE USAGE
LAYOUT PUBLICATIONS
LEGENDS
LETTERS (CORRESPONDENCE)
LIBEL & SLANDER
LISTENING
LISTENING COMPREHENSION
LISTENING COMPREHENSION TESTS
LISTENING GROUPS
LISTENING HABITS

CS

READING AND COMMUNICATION SKILLS

APPLICABLE TERMS

LISTENING SKILLS
LISTENING STRATEGIES
LITERACY
LITERACY AS SOCIAL PROCESS
LITERACY EDUCATION
LITERARY CANON
LITERARY CRITICISM
LITERARY DEVICES
LITERARY GENRES
LITERARY HISTORY
LITERARY POLITICS
LITERARY STYLES
LITERARY THEORY
LITERATURE
LITERATURE APPRECIATION
LITERATURE BASED INSTRUCTION
LITERATURE INSTRUCTION
LOCAL MEDIA
LOCAL NEWS
LYRIC POETRY

MARKETING
MASS MEDIA
MASS MEDIA EFFECTS
MASS MEDIA ROLE
MASS MEDIA USE
MEDIA ADAPTATION
MEDIA BIAS
MEDIA COVERAGE
MEDIA RESEARCH
MEDIA ROLE
MEDIA SELECTION
MEDIEVAL LITERATURE
METAPHORS
MEXICAN AMERICAN LITERATURE

NARRATIVE TEXT
NEW JOURNALISM
NEWS MEDIA
NEWS REPORTERS
NEW SOURCES
NEWS STORIES
NEWS TOPICS
NEWS WRITING
NEWSMAGAZINES
NEWSPAPERS
NINETEENTH CENTURY LITERATURE
NONFICTION
NONPRINT MEDIA
NONVERBAL COMMUNICATION
NORTH AMERICAN LITERATURE
NOTETAKING
NOVELS

ORAL ENGLISH
ORAL INTERPRETATION
ORGANIZATIONAL CHANGE
ORGANIZATIONAL CLIMATE
ORGANIZATIONAL COMMUNICATION
OUTLINING (DISCOURSE)

PARAGRAPH COMPOSITION
PARALLELISM (LITERARY)
PARTICIPATIVE DECISION MAKING
PERSONAL NARRATIVES
PERSUASIVE DISCOURSE
PHOTOJOURNALISM
PICTURE BOOKS
PLAGIARISM
PLAYWRITING
POETRY
POETS
POLITICAL COMMUNICATION
POLITICAL RHETORIC
PREREADING EXPERIENCE
PRESS OPINION
PRESS RESPONSIBILITY
PRESS ROLE
PREWRITING
PROGRAMING (BROADCAST)
PROOFREADING
PROPAGANDA
PROSE
PUBLIC COMMUNICATION
PUBLIC RELATIONS
PUBLIC SPEAKING
PUBLIC TELEVISION
PURPOSE (COMPOSITION)

RADIO
READABILITY
READABILITY FORMULAS
READER RESPONSE
READER TEXT RELATIONSHIP
READERS THEATER
READING
READING ABILITY
READING ACHIEVEMENT
READING ALOUD TO OTHERS
READING ASSIGNMENTS
READING ATTITUDES
READING BEHAVIOR
READING CENTERS
READING COMPREHENSION
READING CONSULTANTS
READING DIAGNOSIS
READING DIFFICULTIES
READING FAILURE
READING FLUENCY
READING GAMES
READING HABITS
READING IMPROVEMENT
READING INSTRUCTION
READING INTERESTS
READING MATERIAL SELECTION
READING MATERIALS
READING MOTIVATION
READING PROCESSES
READING PROGRAMS
READING RATE
READING READINESS
READING READINESS TESTS
READING RESEARCH
READING SKILLS
READING SPEAKING RELATIONSHIP
READING STRATEGIES
READING TEACHERS
READING TESTS
READING WRITING RELATIONSHIP
RECALL (PSYCHOLOGY)
RECOGNITION (PSYCHOLOGY)
RECREATIONAL READING
REMEDIAL READING
REMEDIAL READING SERVICES
REPEATED READINGS
RESEARCH PAPERS (STUDENTS)
RESPONSE TO LITERATURE
RETENTION (PSYCHOLOGY)
REVISION (WRITTEN COMPOSITION)
RHETORIC
RHETORICAL CRITICISM
RHETORICAL DEVICES
RHETORICAL EFFECTIVENESS
RHETORICAL INVENTION
RHETORICAL STRATEGIES
RHETORICAL THEORY

SCHEMATA (COGNITION)
SCHOLARLY WRITING
SCHOOL NEWSPAPERS
SCHOOL PUBLICATIONS
SCIENCE FICTION
SELF CONCEPT
SELF SELECTION (READING)
SEVENTEENTH CENTURY LITERATURE
SHORT STORIES
SIGHT VOCABULARY
SILENT READING
SIXTEENTH CENTURY LITERATURE
SOCIOLOGY OF READING
SONNETS
SPANISH LITERATURE
SPEAKING THINKING RELATIONSHIP
SPEAKING WRITING RELATIONSHIP
SPEECH
SPEECH COMMUNICATION
SPEECH CURRICULUM
SPEECH EVALUATION
SPEECH HABITS
SPEECH INSTRUCTION
SPEECH SKILLS
SPEED READING
SPELLING
SPELLING INSTRUCTION
SPELLING PATTERNS
STORY TELLING
STORY WRITING
STUDENT JOURNALS
STUDENT PUBLICATIONS

STUDENT WRITING MODELS
STUDY SKILLS
SUPPLEMENTARY READING
  MATERIALS
SUSTAINED SILENT READING
SYMBOLS (LITERARY)

TECHNICAL WRITING
TELECOMMUNICATIONS
TELECONFERENCING
TELEVISION
TELEVISION COMMERCIALS
TELEVISION CRITICISM
TELEVISION CURRICULUM
TELEVISION LITERARY
TELEVISION NETWORKS
TELEVISION NEWS
TELEVISION RESEARCH
TELEVISION ROLE
TELEVISION VIEWING
TELEVISION WRITING
TEXT FACTORS
THEATER ARTS
THEME (LITERARY)
THINKING SKILLS
TOTAL COMMUNICATION
TWENTIETH CENTURY
  LITERATURE

VERBAL COMMUNICATION
VISUAL LITERACY
VOCABULARY
VOCABULARY DEVELOPMENT
VOCABULARY SKILLS

WHOLE LANGUAGE APPROACH
WOMENS LITERATURE
WORD RECOGNITION
WORLD LITERATURE
WRITING (COMPOSITION)
WRITING ACROSS THE
  CURRICULUM
WRITING APPREHENSION
WRITING ASSIGNMENTS
WRITING CONTEXTS
WRITING DIFFICULTIES
WRITING EVALUATION
WRITING EXERCISES
WRITING FOR PUBLICATION
WRITING IMPROVEMENT
WRITING INSTRUCTION
WRITING LABORATORIES
WRITING PROCESSES
WRITING READINESS
WRITING RESEARCH
WRITING SKILLS
WRITING STRATEGIES
WRITTEN LANGUAGE

YEARBOOKS

EDUCATIONAL MANAGEMENT (EA)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

Educational management encompasses all aspects of the governance, leadership, administration, and structure of public and private educational organizations at the elementary and secondary levels.

This includes:

(1) The preservice and inservice preparation of administrators, including traditional and innovative training programs, mentorships, and assessment centers.

(2) The social, political governmental, community, technological, and legal contexts of educational organizations, including societal trends, new technological developments, political issues, state and federal programs, policies, and legal requirements affecting the operation of schools.

(3) The planning, design, construction, equipping, furnishing, maintenance, and renovation, of educational facilities--the physical environment for learning--(at all academic levels, see note).

(4) The roles and responsibilities of local and state boards of education in educational governance. Strategic planning and the development, implementation, effects, and evaluation of educational policies.

(5) Educational finance, state and federal financial support, local school budgets and bond issues, and financial equity issues.

(6) Methods and varieties of district and school organization and structure, including grade organization options, traditional and alternative schools, school choice issues, rescheduled school year plans, alternative district and school decision-making structure, and restructuring issues.

(7) The tasks and processes of educational administration: business management; public relations; staff personnel administration (recruitment, selection, induction, evaluation, collective bargaining, affirmative action); pupil personnel administration; pupil transportation; conflict management; management applications of computers and other technologies (data processing, management information systems, simulation models, management of instructional technology); quantitative methods (operations research, systems analysis); program evaluation.

(8) Leadership of the instructional process: defining the school's mission; managing and overseeing curriculum and instruction; promoting a positive learning climate; observing and providing feedback to teachers; assessing the instructional program and its effectiveness.

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Educational Management (EA)

II. EXPLANATORY NOTES

1. **Educational Facilities (journal articles)**
Most education facilities journals cover all academic levels. Although EA's scope is normally restricted to elementary and secondary education, an exception is made in this case so that EA can cover all articles in these journals, regardless of level.

2. **Teacher Evaluation**
Teacher Evaluation is an overlap area between EA and SP (and occasionally TM). Because Teacher Evaluation is usually the responsibility of administrators, it is of interest to EA and is considered in scope. Because it concerns teacher education, however, it is also of interest to SP. (The evaluation process itself may occasionally be of interest also to TM). It has been agreed that *"materials dealing with the effects of teacher evaluation on teacher education (programs, curricula, etc.) are to be considered in SP 's scope area."*

3. **Clientele (as an indicator of subject interests)**
The EA clientele fall into the following four categories:

    a. Educational policymakers at the national, state, and local levels, e.g., legislators, state education department personnel, school board members.

    b. Facilities in educational administration at colleges and universities, e.g., researchers, trainers of teachers and administrators.

    c. Educational practitioners at all levels, e.g., administrators, supervisors, public relations directories, business officials, legal advisors, and teachers.

    d. Parents (as they become more involved in matters of educational governance).

III. BRIEF STATEMENT

All aspects of the governance, leadership, administration, and structure of public and private educational organizations at the elementary and secondary levels, including the provision of physical facilities for their operation.

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EDUCATIONAL MANAGEMENT
APPLICABLE TERMS

EA

ACADEMIC ACHIEVEMENT
ACADEMIC FAILURE
ACADEMIC FREEDOM
ACCESS TO EDUCATION
ACCESSIBILITY (FOR DISABLED)
ACCIDENT PREVENTION
ACCOUNTABILITY
ACOUSTIC INSULATION
ACOUSTICAL ENVIRONMENT
ACQUIRED IMMUNE DEFICIENCY SYNDROME
ADMINISTRATION
ADMINISTRATIVE CHANGE
ADMINISTRATIVE ORGANIZATION
ADMINISTRATIVE POLICY
ADMINISTRATIVE PRINCIPLES
ADMINISTRATIVE PROBLEMS
ADMINISTRATOR ATTITUDES
ADMINISTRATOR CERTIFICATION
ADMINISTRATOR CHARACTERISTICS
ADMINISTRATOR EDUCATION
ADMINISTRATOR EFFECTIVENESS
ADMINISTRATOR EVALUATION
ADMINISTRATOR GUIDES
ADMINISTRATOR QUALIFICATIONS
ADMINISTRATOR RESPONSIBILITY
ADMINISTRATOR ROLE
ADMINISTRATOR SELECTION
ADMINISTRATORS
ADMISSION (SCHOOL)
ADOPTION (IDEAS)
ADVISORY COMMITTEES
AFFIRMATIVE ACTION
AFTER SCHOOL PROGRAMS
AGE DISCRIMINATION
AGENCY COOPERATION
AIR CONDITIONING
AIR FLOW
AIR POLLUTION
AIR STRUCTURES
ALARM SYSTEMS
ALCOHOL ABUSE
ALTERNATIVE ENERGY SOURCES
ANIMAL FACILITIES
ANNOTATED BIBLIOGRAPHIES
ANNUAL REPORTS
ARBITRATION
ARCHITECTS
ARCHITECTURAL CHARACTER
ARCHITECTURAL PROGRAMING
ARCHITECTURAL RESEARCH
ARTS CENTERS
ASBESTOS
ASSESSMENT CENTERS (PERSONNEL)
ASSISTANT PRINCIPALS
ATHLETIC FIELDS
ATTENDANCE
ATTENDANCE OFFICERS
ATTENDANCE RECORDS
AUDIOVISUAL CENTERS
AUDITORIUMS
AUDITS (VERIFICATION)
AUTHORITARIANISM
AUTHORITY
AVERAGE DAILY ATTENDANCE
AWARDS

BACK TO BASICS
BEHAVIOR PROBLEMS
BEHAVIOR STANDARDS
BIDS
BOARD ADMINISTRATOR RELATIONSHIP
BOARD OF EDUCATION POLICY
BOARD OF EDUCATION ROLE
BOARDS OF EDUCATION
BOND ISSUES
BRAIN RESEARCH
BREAKFAST PROGRAMS
BUDGETING
BUDGETS
BUILDING CONVERSION
BUILDING DESIGN
BUILDING INNOVATION
BUILDING OBSOLESCENCE
BUILDING OPERATION
BUILDING PLANS
BUILDING SYSTEMS
BUREAUCRACY
BURNOUT
BUS TRANSPORTATION
BUSINESS EDUCATION FACILITIES
BUSING

CAMPUS PLANNING
CAPITAL OUTLAY (FOR FIXED ASSETS)
CAREER CHOICE
CAREER LADDERS
CARPETING
CATHOLIC EDUCATORS
CATHOLIC SCHOOLS
CEILINGS
CENSORSHIP
CENSUS FIGURES
CENTRALIZATION
CERTIFICATION
CHANGE AGENTS
CHANGE STRATEGIES
CHILD ABUSE
CITIZEN PARTICIPATION
CIVIL LIBERTIES
CIVIL RIGHTS
CIVIL RIGHTS LEGISLATION
CLASS ORGANIZATION
CLASS SIZE
CLASSROOM DESIGN
CLASSROOM ENVIRONMENT
CLASSROOM FURNITURE
CLASSROOM TECHNIQUES
CLIMATE CONTROL
CLINICAL SUPERVISION (OF TEACHERS)
COACHING
CODES OF ETHICS
COLLECTIVE BARGAINING
COLLEGE HOUSING
COLLEGE SCHOOL COOPERATION
COLLEGIALITY
COMMUNICABLE DISEASES
COMMUNICATION SATELLITES
COMMUNICATION SKILLS
COMMUNITY ATTITUDES
COMMUNITY BASED EDUCATION
COMMUNITY EDUCATION
COMMUNITY INVOLVEMENT
COMMUNITY ORGANIZATIONS
COMMUNITY ROLE
COMMUNITY SURVEYS
COMPARABLE WORTH
COMPARATIVE ANALYSIS
COMPENSATION (REMUNERATION)
COMPETENCY BASED EDUCATION
COMPLIANCE (LEGAL)
COMPUTER USES IN EDUCATION
COMPUTER USES IN MANAGEMENT
COMPUTERS
CONFIDENTIALITY
CONFLICT
CONFLICT RESOLUTION
CONSENSUS
CONSOLIDATED SCHOOLS
CONSTITUTIONAL LAW
CONSTRUCTION (PROCESS)
CONSTRUCTION COSTS
CONSTRUCTION MANAGEMENT
CONSTRUCTION MATERIALS
CONSTRUCTION NEEDS
CONSTRUCTION PROGRAMS
CONSUMER CULTURE
CONTINUOUS PROGRESS PLAN
CONTROVERSIAL ISSUES (COURSE CONTENT)
COOPERATION
COPYRIGHTS
CORPORAL PUNISHMENT
COST EFFECTIVENESS
COURT DOCTRINE
COURT JUDGES
COURT LITIGATION
COURT ROLE
COURTS
CREATIONISM
CREDENTIALS
CRIME PREVENTION
CRISIS INTERVENTION
CRISIS MANAGEMENT
CULTURAL CENTERS
CULTURAL PLURALISM
CURRICULUM DESIGN
CURRICULUM DEVELOPMENT

EA

EDUCATIONAL MANAGEMENT
APPLICABLE TERMS

CURRICULUM EVALUATION
CURRICULUM SPECIALISTS
CURRICULUM STUDY CENTERS

DATABASE MANAGEMENT SYSTEMS
DAY CARE CENTERS
DECENTRALIZATION
DECISION MAKING
DECLINING ENROLLMENT
DEGREE REQUIREMENTS
DELINQUENCY PREVENTION
DELPHI TECHNIQUE
DEMOCRATIC VALUES
DEMOGRAPHY
DEMONSTRATION CENTERS
DEPARTMENT HEADS
DEPENDENTS SCHOOLS
DESEGREGATION METHODS
DESIGN
DESIGN BUILD APPROACH
DESIGN REQUIREMENTS
DIFFERENTIATED STAFFS
DINING FACILITIES
DIRECT INSTRUCTION
DISABILITIES
DISCIPLINE
DISCIPLINE POLICY
DISCIPLINE PROBLEMS
DISCRIMINATORY LEGISLATION
DISMISSAL (PERSONNEL)
DRESS CODES
DROPOUT ATTITUDES
DROPOUT CHARACTERISTICS
DROPOUT PREVENTION
DROPOUT PROGRAM
DROPOUT RATE
DROPOUT RESEARCH
DROPOUTS
DRUG ABUSE
DRUG LEGISLATION
DRUG USE
DRUG USE TESTING
DUE PROCESS

EARLY RETIREMENT
EDUCATION SERVICE CENTERS
EDUCATIONAL ADMINISTRATION
EDUCATIONAL ASSESSMENT
EDUCATIONAL CHANGE
EDUCATIONAL COMPLEXES
EDUCATIONAL COOPERATION
EDUCATIONAL DEMAND
EDUCATIONAL DEVELOPMENT
EDUCATIONAL ECONOMICS
EDUCATIONAL ENVIRONMENT
EDUCATIONAL EQUIPMENT
EDUCATIONAL EQUITY (FINANCE)
EDUCATIONAL FACILITIES
EDUCATIONAL FACILITIES DESIGN
EDUCATIONAL FACILITIES IMPROVEMENT
EDUCATIONAL FACILITIES PLANNING
EDUCATIONAL FINANCE
EDUCATIONAL HISTORY
EDUCATIONAL IMPROVEMENT
EDUCATIONAL INNOVATION
EDUCATIONAL LEGISLATION
EDUCATIONAL MALPRACTICE
EDUCATIONAL NEEDS
EDUCATIONAL OBJECTIVES
EDUCATIONAL PARKS
EDUCATIONAL PLANNING
EDUCATIONAL POLICY
EDUCATIONAL PRINCIPLES
EDUCATIONAL QUALITY
EDUCATIONAL RESEARCH
EDUCATIONAL RESEARCHERS
EDUCATIONAL RESOURCES
EDUCATIONAL RESPONSIBILITY
EDUCATIONAL TRENDS
EDUCATIONAL VOUCHERS
EDUCATIONALLY DISADVANTAGED
EFFICIENCY
EMERGENCY PROGRAMS
EMPLOYEE ASSISTANCE PROGRAMS
EMPLOYER EMPLOYEE RELATIONSHIP
EMPLOYMENT INTERVIEWS
EMPLOYMENT PRACTICES
EMPLOYMENT PROJECTIONS
EMPOWERMENT
ENCAPSULATED FACILITIES
ENERGY AUDITS
ENERGY CONSERVATION
ENERGY CRISIS
ENERGY MANAGEMENT
ENROLLMENT
ENROLLMENT INFLUENCES
ENROLLMENT PROJECTIONS
ENROLLMENT RATE
ENROLLMENT TRENDS
EQUAL EDUCATION
EQUAL FACILITIES
EQUAL OPPORTUNITIES (JOBS)
EQUAL PROTECTION
EQUALIZATION AID
EQUIPMENT EVALUATION
EQUIPMENT STANDARDS
EQUIPMENT UTILIZATION
ETHICS
EVALUATION CRITERIA
EVALUATION METHODS
EVALUATION NEEDS
EVALUATION PROBLEMS
EVALUATION RESEARCH
EVALUATION UTILIZATION
EVIDENCE
EXCELLENCE
EXCELLENCE IN EDUCATION
EXPENDITURE PER STUDENT
EXPENDITURES
EXPERIENCED TEACHERS
EXPERIMENTAL PROGRAMS
EXPULSION
EXTENDED SCHOOL DAY
EXTENDED SCHOOL YEAR
EXTRACURRICULAR ACTIVITIES

FACILITATORS
FACILITIES
FACILITY CASE STUDIES
FACILITY EXPANSION
FACILITY GUIDELINES
FACILITY IMPROVEMENT
FACILITY INVENTORY
FACILITY REQUIREMENTS
FACILITY UTILIZATION RESEARCH
FAMILY SCHOOL RELATIONSHIP
FAST TRACK SCHEDULING
FEDERAL AID
FEDERAL COURTS
FEDERAL GOVERNMENT
FEDERAL LEGISLATION
FEDERAL PROGRAM
FEDERAL REGULATION
FEDERAL STATE RELATIONSHIP
FEMALES
FEMINISM
FINANCE REFORM
FINANCIAL AUDITS
FINANCIAL NEEDS
FINANCIAL POLICY
FINANCIAL PROBLEMS
FINANCIAL SUPPORT
FISCAL CAPACITY
FLEXIBLE FACILITIES
FLEXIBLE LIGHTING DESIGN
FLEXIBLE PROGRESSION
FLEXIBLE SCHEDULING
FLOORING
FOLLOWUP STUDIES
FOOD HANDLING FACILITIES
FOOD SERVICES
FOOD STANDARDS
FOREIGN COUNTRIES
FORMATIVE EVALUATION
FOUND SPACES
FRAUD
FREEDOM OF SPEECH
FRINGE BENEFITS
FUEL CONSUMPTION
FULL STATE FUNDING
FURNITURE DESIGN
FUTURES (OF SOCIETY)

GAME THEORY
GIFTED
GOAL SETTING
GOVERNANCE
GOVERNING BOARDS
GOVERNMENT (ADMINISTRATIVE BODY)

EDUCATIONAL MANAGEMENT
APPLICABLE TERMS

EA

GOVERNMENT EMPLOYEES
GOVERNMENT PUBLICATIONS
GOVERNMENT ROLE
GOVERNMENT SCHOOL RELATIONSHIP
GRADE REPETITION
GRADUATION REQUIREMENTS
GRANTS
GRANTSMANSHIP
GRIEVANCE PROCEDURES
GROUP BEHAVIOR
GROUP DYNAMICS
GROUPING (INSTRUCTIONAL PURPOSE)
GUIDELINES
GYMNASIUMS

HAZARDOUS MATERIALS
HEALTH FACILITIES
HEARINGS
HEATING
HIDDEN CURRICULUM
HIGH RISK STUDENTS
HIGH SCHOOL STUDENTS
HIGH SCHOOLS
HIGHER EDUCATION
HOME SCHOOLING
HOMELESS PEOPLE
HORIZONTAL ORGANIZATION
HOUSE PLAN
HOUSING NEEDS
HUMAN CAPITAL
HUMAN FACTORS ENGINEERING
HUMAN RESOURCES
HUMANIZATION

IDENTIFICATION
ILLEGAL DRUG USE
IMPROVEMENT PROGRAMS
IN SCHOOL SUSPENSION
INCENTIVES
INDEXES
INDIVIDUAL CHARACTERISTICS
INDIVIDUAL DEVELOPMENT
INDIVIDUAL DIFFERENCES
INDIVIDUALIZED EDUCATION PROGRAMS
INDIVIDUALIZED INSTRUCTION
INFORMATION DISSEMINATION
INFORMATION MANAGEMENT
INFORMATION NEEDS
INFORMATION NETWORKS
INFORMATION PROCESSING
INFORMATION RETRIEVAL
INFORMATION SOURCES
INFORMATION UTILIZATION
INPUT OUTPUT ANALYSIS
INSERVICE EDUCATION
INSERVICE TEACHER EDUCATION
INSTITUTIONAL ADMINISTRATION
INSTITUTIONAL CHARACTERISTICS
INSTITUTIONAL COOPERATION
INSTRUCTIONAL DESIGN
INSTRUCTIONAL DEVELOPMENT
INSTRUCTIONAL EFFECTIVENESS
INSTRUCTIONAL IMPROVEMENT
INSTRUCTIONAL INNOVATION
INSTRUCTIONAL LEADERSHIP
INSTRUCTIONAL MATERIALS
INSURANCE
INTEREST (FINANCE)
INTEREST GROUPS
INTERIOR DESIGN
INTERIOR SPACE
INTERMEDIATE ADMINISTRATIVE UNITS
INTERNSHIP PROGRAMS
INTERPERSONAL COMMUNICATION
INTERPERSONAL RELATIONSHIP
INTERPROFESSIONAL RELATIONSHIP
INTERVENTION
INTERVIEWS
INVESTMENT

JOB PERFORMANCE
JOB SATISFACTION
JOB STRESS
JUNIOR HIGH SCHOOLS

KINDERGARTEN
KNOWLEDGE UTILIZATION

LABOR DEMANDS
LABOR FORCE
LABOR FORCE DEVELOPMENT
LABOR MARKET
LABOR NEEDS
LABOR PROBLEMS
LABOR RELATIONS
LABOR STANDARDS
LABOR SUPPLY
LABOR TURNOVER
LABOR UTILIZATION
LAND USE
LANDSCAPING
LAW ENFORCEMENT
LAWS
LAWYERS
LEADERSHIP
LEADERSHIP QUALITIES
LEADERSHIP RESPONSIBILITIES
LEADERSHIP STYLES
LEADERSHIP TRAINING
LEARNING ACTIVITIES
LEARNING ENVIRONMENT
LEARNING MOTIVATION
LEARNING PROBLEMS
LEARNING PROCESSES
LEARNING RESOURCES CENTERS
LEGAL PROBLEMS
LEGAL RESPONSIBILITY
LEGISLATION
LEGISLATORS
LIBRARY FACILITIES
LIFE CYCLE COSTING
LIGHTING
LIGHTING DESIGN
LINKAGE
LITERATURE REVIEWS
LOBBYING
LOCAL AREA NETWORKS
LOCAL GOVERNMENT
LONG RANGE PLANNING
LONGITUDINAL STUDIES
LOW ACHIEVEMENT
LUNCH PROGRAMS

MAGNET SCHOOLS
MAINSTREAMING
MAINTENANCE
MAN MACHINE SYSTEMS
MANAGEMENT BY OBJECTIVES
MANAGEMENT DEVELOPMENT
MANAGEMENT GAMES
MANAGEMENT INFORMATION SYSTEMS
MANAGEMENT SYSTEMS
MANAGEMENT TEAMS
MASLOWS HIERARCHY OF NEEDS
MASTER PLANS
MEASUREMENT
MEASUREMENT TECHNIQUES
MEDIATION
MERCHANDISE INFORMATION
MERIT PAY
METHODS
MICROCOMPUTERS
MIDDLE MANAGEMENT
MIDDLE SCHOOLS
MINIMUM COMPETENCY TESTING
MINORITY GROUP TEACHERS
MINORITY GROUPS
MOBILE CLASSROOMS
MODELS
MODULAR BUILDING DESIGN
MONEY MANAGEMENT
MONITORING
MORAL DEVELOPMENT
MORAL ISSUES
MORAL VALUES
MOTIVATION
MOTIVATION TECHNIQUES
MOVABLE PARTITIONS
MULTIPURPOSE CLASSROOMS

NATIONAL SURVEYS
NEEDS ASSESSMENT
NEGLIGENCE
NEGOTIATION AGREEMENTS
NEGOTIATION IMPASSES
NEIGHBORHOOD SCHOOLS
NOISE (SOUND)
NONTRADITIONAL EDUCATION

EA

EDUCATIONAL MANAGEMENT
APPLICABLE TERMS

OCCUPATIONAL INFORMATION
OCCUPATIONAL SURVEYS
OFFICES (FACILITIES)
OPEN PLAN SCHOOLS
OPERATIONS RESEARCH
ORGANIZATION
ORGANIZATIONAL CHANGE
ORGANIZATIONAL CLIMATE
ORGANIZATIONAL COMMUNICATION
ORGANIZATIONAL DECLINE
ORGANIZATIONAL DEVELOPMENT
ORGANIZATIONAL EFFECTIVENESS
ORGANIZATIONAL OBJECTIVES
ORGANIZATIONAL THEORIES
ORGANIZATIONS (GROUPS)
OUTCOMES OF EDUCATION

PARENT ATTITUDES
PARENT PARTICIPATION
PARENT RESPONSIBILITY
PARENT SCHOOL RELATIONSHIP
PARKING FACILITIES
PARKS
PAROCHIAL SCHOOLS
PARTICIPATIVE DECISION MAKING
PEER EVALUATION
PERFORMANCE CONTRACTS
PERSONNEL MANAGEMENT
PERSONNEL POLICY
PERSONNEL SELECTION
PHYSICAL ENVIRONMENT
PNEUMATIC FORMS
POLICE SCHOOL RELATIONSHIP
POLICY ANALYSIS
POLICY FORMATION
POLITICAL INFLUENCES
POLITICAL POLICY
POLITICS OF EDUCATION
POPULATION TRENDS
POSITIVISM
POTENTIAL DROPOUTS
POWER STRUCTURE
PREDICTION
PREFABRICATION
PREGNANT STUDENTS
PRESTRESSED CONCRETE
PREVENTION
PREVENTIVE MAINTENANCE
PRINCIPALS
PRIORITIES
PRIVATE FINANCIAL SUPPORT
PRIVATE SCHOOL AID
PRIVATE SCHOOLS
PRIVATE SECTOR
PROBLEM SOLVING
PRODUCTIVITY PROFESSIONAL AUTONOMY
PROFESSIONAL DEVELOPMENT
PROFESSIONAL PERSONNEL
PROFESSIONALISM

PROGRAM ADMINISTRATION
PROGRAM BUDGETING
PROGRAM COSTS
PROGRAM DEVELOPMENT
PROGRAM EFFECTIVENESS
PROGRAM EVALUATION
PROGRAM GUIDES
PROGRAM IMPROVEMENT
PROPERTY ACCOUNTING
PROPERTY APPRAISAL
PROPERTY TAXES
PROPRIETARY SCHOOLS
PUBLIC FACILITIES
PUBLIC OFFICIALS
PUBLIC OPINION
PUBLIC POLICY
PUBLIC RELATIONS
PUBLIC SECTOR
PURCHASING
PYRAMID ORGANIZATION

QUALITY CONTROL
QUALITY OF WORKING LIFE
QUARTER SYSTEM

RECOGNITION (ACHIEVEMENT)
RECORDKEEPING
RECORDS (FORMS)
RECORDS MANAGEMENT
RECREATIONAL FACILITIES
RECYCLING
REDUCTION IN FORCE
REENTRY WORKERS
REFLECTIVE THINKING
REGIONAL PLANNING
RELIGION
RELIGIOUS FACTORS
RELOCATABLE FACILITIES
RESEARCH AND DEVELOPMENT
RESEARCH AND DEVELOPMENT CENTERS
RESEARCH DESIGN
RESEARCH MANAGEMENT
RESEARCH METHODOLOGY
RESEARCH NEEDS
RESEARCH PROBLEMS
RESEARCH TRENDS
RESEARCH UTILIZATION
RESOURCE ALLOCATION
RETIREMENT
RETIREMENT BENEFITS
RETRENCHMENT
REVENUE SHARING
REWARDS
RISK MANAGEMENT
ROLE CONFLICT
ROLE OF EDUCATION
ROLE PERCEPTION
ROOFING
RULES AND REGULATION

SAFETY EQUIPMENT
SALARIES
SALARY WAGE DIFFERENTIALS
SANITARY FACILITIES
SANITATION
SCHEDULING
SCHOOL ACCOUNTING
SCHOOL ADMINISTRATION
SCHOOL AGE DAY CARE
SCHOOL ATTENDANCE LEGISLATION
SCHOOL BASED MANAGEMENT
SCHOOL BUDGET ELECTIONS
SCHOOL BUILDINGS
SCHOOL BUSES
SCHOOL BUSINESS OFFICIALS
SCHOOL BUSINESS RELATIONSHIP
SCHOOL CHOICE
SCHOOL COMMUNITY RELATIONSHIP
SCHOOL CONSTRUCTION
SCHOOL DEMOGRAPHY
SCHOOL DISTRICT AUTONOMY
SCHOOL DISTRICT REORGANIZATION
SCHOOL DISTRICT SIZE
SCHOOL DISTRICT SPENDING
SCHOOL DISTRICT WEALTH
SCHOOL DISTRICTS
SCHOOL EFFECTIVENESS
SCHOOL EXPANSION
SCHOOL FUNDS
SCHOOL HOLDING POWER
SCHOOL LAW
SCHOOL MAINTENANCE
SCHOOL ORGANIZATION
SCHOOL PERSONNEL
SCHOOL POLICY
SCHOOL PRAYER
SCHOOL RESPONSIBILITY
SCHOOL RESTRUCTURING
SCHOOL ROLE
SCHOOL SAFETY
SCHOOL SCHEDULES
SCHOOL SECURITY
SCHOOL SIZE
SCHOOL SPACE
SCHOOL STATISTICS
SCHOOL SUPERVISION
SCHOOL SURVEYS
SCHOOL TAXES
SCHOOL VANDALISM
SCHOOL ZONING
SCIENCE FACILITIES
SCIENCE LABORATORIES
SCOPE OF BARGAINING
SEARCH AND SEIZURE
SECURITY PERSONNEL
SEMESTER SYSTEM
SENIORITY
SEX

EDUCATIONAL MANAGEMENT
APPLICABLE TERMS

EA

SEX BIAS
SEX DIFFERENCES
SEX DISCRIMINATION
SEX FAIRNESS
SEX ROLE
SEX STEREOTYPES
SEXUAL ABUSE
SEXUAL HARASSMENT
SEXUAL IDENTITY
SHARED FACILITIES
SHARED RESOURCES AND SERVICES
SITE ANALYSIS
SITE DEVELOPMENT
SITE SELECTION
SOCIAL CHANGE
SOCIAL NETWORKS
SOCIAL PROBLEMS
SOCIOECONOMIC STATUS
SPACE CLASSIFICATION
SPACE DIVIDERS
SPACE UTILIZATION
SPATIAL RELATIONSHIPS (FACILITIES)
SPECIFICATIONS
STAFF DEVELOPMENT
STAFF UTILIZATION
STANDARDS
STATE AID
STATE AID FORMULAS
STATE BOARDS OF EDUCATION
STATE COURTS
STATE DEPARTMENTS OF EDUCATION
STATE FEDERAL AID
STATE GOVERNMENT
STATE LEGISLATION
STATE OFFICIALS
STATE PROGRAMS
STATE REGULATION
STATE SCHOOL DISTRICT RELATIONSHIP
STATE STANDARDS
STATE SURVEYS
STRESS MANAGEMENT
STRUCTURAL BUILDING SYSTEMS
STRUCTURAL ELEMENTS (CONSTRUCTION)
STUDENT ATTITUDES
STUDENT CHARACTERISTICS
STUDENT EVALUATION OF TEACHER PERFORMANCE
STUDENT IMPROVEMENT
STUDENT MOTIVATION
STUDENT NEEDS
STUDENT PARTICIPATION
STUDENT RECORDS
STUDENT RESPONSIBILITY
STUDENT RIGHTS
STUDENT SCHOOL RELATIONSHIP
STUDENT TRANSPORTATION
STUDY FACILITIES
SUBSTANCE ABUSE
SUMMATIVE EVALUATION
SUPERINTENDENTS
SUPERVISION
SUPERVISORS
SUPERVISORY METHODS
SUPERVISORY TRAINING
SURVEYS
SUSPENSION
SYSTEM ANALYSIS
SYSTEMS APPROACH
SYSTEMS BUILDING
SYSTEMS DEVELOPMENT

TABLES (DATA)
TASK FORCE APPROACH
TAX ALLOCATION
TAX CREDITS
TAX DEDUCTION
TAX EFFORT
TAX EXEMPTIONS
TAX RATES
TEACHER ADMINISTRATOR RELATIONSHIP
TEACHER ASSOCIATIONS
TEACHER ATTITUDES
TEACHER BEHAVIOR
TEACHER BURNOUT
TEACHER CHARACTERISTICS
TEACHER DISCIPLINE
TEACHER DISMISSAL
TEACHER EFFECTIVENESS
TEACHER EMPLOYMENT
TEACHER EMPOWERMENT
TEACHER EVALUATION
TEACHER IMPROVEMENT
TEACHER MILITANCY
TEACHER MORALS
TEACHER MOTIVATION
TEACHER PARTICIPATION
TEACHER PROMOTION
TEACHER RECRUITMENT
TEACHER RESPONSIBILITIES
TEACHER RIGHTS
TEACHER ROLE
TEACHER SALARIES
TEACHER SELECTION
TEACHER STRIKES
TEACHER STUDENT RELATIONSHIP
TEACHER SUPPLY AND DEMAND
TEAMWORK
TECHNOLOGICAL ADVANCEMENT
TELECOMMUNICATIONS
TENURE
TESTIMONY
TEXTBOOK SELECTION
TEXTBOOKS STANDARDS
THEATRES
THEORIES
THEORY PRACTICE RELATIONSHIPS
THERMAL ENVIRONMENT
THERMAL INSULATION
THINKING SKILLS
TIME MANAGEMENT
TOILET FACILITIES
TORTS
TRAFFIC SAFETY
TRUANCY
TURF MANAGEMENT

UNCERTAINTY
UNDERGROUND FACILITIES
UNIONS

VALUES
VANDALISM
VENTILATION
VERTICAL ORGANIZATION
VIOLENCE
VISUAL ENVIRONMENT

WASTE DISPOSAL
WIND ENERGY
WINDOWLESS ROOMS
WOMEN ADMINISTRATORS
WOMEN FACULTY
WORK ENVIRONMENT
WORKSHOPS

YEAR ROUND SCHOOLS

ZERO BASE BUDGETING

HANDICAPPED AND GIFTED CHILDREN (EC)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

A. Handicapped

All aspects of the education and development of persons with disabilities are covered. Disabilities may range from mild to severe and include the following types: hearing and visual impairments; mental retardation; physical handicaps; behavior disorders (emotional disturbance); learning disabilities; speech impairments; health impairments; multiple disabilities; and autism. Also considered in scope are high-risk children and youth, such as the abused or neglected, and those with special health care needs (the medically fragile). Persons with disabilities among the following populations are of particular interest: adjudicated youth; cultural or ethnic minorities; the economically disadvantaged; and the geographically isolated. The educational needs of persons with disabilities, and services for those individuals, are covered in all settings, e.g., public or private schools, the home, programs at all educational and age levels, and institutional and community programs. Related services for those with disabilities are also covered, including professional services from audiologists, speech therapists, occupational therapists, physical therapists, and educational psychologists. Other aspects of services for people with disabilities include: prevention; identification; pre-referral intervention; referral; student evaluation; early intervention programs; services for low-incidence populations; school-to-work transition services; individualized education programs (IEPs); individualized family service plans (IFSPs); deinstitutionalization; mainstreaming; least restrictive environment; vocational and lifelong education; employment, rehabilitation, and applications of technology. Physical accessibility for persons with disabilities, e.g., to buildings, facilities, and transportation, is also covered.

B. Gifted

All aspects of the education and development of gifted persons are covered. The gifted include those with either outstanding intellectual ability, outstanding talent in any specific area of achievement, or high creative ability. Among the areas covered are: identification of the gifted; differentiated curriculum for the gifted; enrichment; acceleration programs; the underachieving gifted; the geographically isolated gifted; the disadvantaged gifted; the gifted within minority groups; leadership development among the gifted; and creativity.

II. EXPLANATORY NOTES

The following areas, relevant to various educational populations, are covered by EC when the focus is on either the gifted or those with disabilities (or both): early childhood education curriculum, teaching methods, administration, counseling, career education, professional preparation, federal and state policy, legislative and judicial requirements, and program development and evaluation.

III. BRIEF STATEMENT

All aspects of the education and development of persons (of all ages) who have disabilities or who are gifted, including the delivery of all types of education-related services to these groups. Includes prevention, identification and assessment, intervention, and enrichment for these groups, in both regular and special education settings.

HANDICAPPED AND GIFTED CHILDREN
APPLICABLE TERMS

EC

ABERRANT BEHAVIOR CHECKLIST
ABILITY ACHIEVEMENT DISCREPANCY
ABUSE (OF DISABLED PERSONS)
ACADEMICALLY GIFTED
ACCELERATION
ACCESS TO EDUCATION
ACCESSIBILITY (FOR DISABLED)
ACQUIRED IMMUNE DEFICIENCY SYNDROME
ACTIVE LEARNING
ADAPTED PHYSICAL EDUCATION
ADAPTIVE BEHAVIOR SCALES
ADAPTIVE LEARNING ENVIRONMENTS MODEL
ADAPTIVE BEHAVIOR (OF DISABLED)
ADDITIVE MODELS
ADJUDICATED YOUTH
ADVENTITIOUS IMPAIRMENTS
AGE OF ONSET
AGENCY COOPERATION
AGGRESSION
ALCOHOL ABUSE
ALCOHOLISM
AMERICAN SIGN LANGUAGE
ANOREXIA NERVOSA
ANTISOCIAL BEHAVIOR
APHASIA
ART THERAPY
ARTICULATION (SPEECH)
ARTICULATION IMPAIRMENTS
ASSISTIVE DEVICES (FOR DISABLED)
ASTHMA
ATTENDANTS
ATTENTION CONTROL
ATTENTION DEFICIT DISORDERS
ATTITUDES TOWARD DISABLED
ATTITUDES
AUDIOLOGY
AUDITORY TRAINING
AUDITORY PERCEPTION
AUGMENTATIVE COMMUNICATION SYSTEMS
AUTISM

BASIC SKILLS
BEHAVIOR CHAINING
BEHAVIOR PROBLEMS
BEHAVIOR RATING SCALES
BEHAVIOR CHANGE
BIBLIOTHERAPY
BILINGUAL EDUCATION
BLINDNESS
BRAILLE
BRAILLE TRANSLATION COMPUTER PROGRAMS
BRAIN HEMISPHERE FUNCTIONS
BULIMIA

CANCER
CANE USE (VISUALLY IMPAIRED)
CAREER EDUCATION
CASE MANAGEMENT
CATEGORICAL SPECIAL EDUCATION
CEREBRAL PALSY
CHILD ADVOCACY
CHILD ABUSE AND NEGLECT REPORTING
CHILD ABUSE
CHILD ABUSE AMENDMENTS (1984)
CHILD NEGLECT
CLASSROOM TECHNIQUES
CLEFT PALATE
CLINICAL DIAGNOSIS
CLOSED CAPTIONED TELEVISION
COMMUNICABLE DISEASES
COMMUNICATION DISORDERS
COMMUNICATION AIDS (FOR DISABLED)
COMMUNITY REFERENCED CURRICULUM
COMMUNITY BASED EDUCATION
COMPETENCY BASED EDUCATION
COMPETENCY BASED TEACHER EDUCATION
COMPETITIVE EMPLOYMENT
COMPLIANCE (LEGAL)
COMPUTER ASSISTED THERAPY TECHNIQUES
COMPUTER ASSISTED INSTRUCTION
COMPUTER ASSISTED TESTING
COMPUTER MANAGED INSTRUCTION
CONGENITAL IMPAIRMENTS
CONSULTATION PROGRAMS
CONTINGENCY MANAGEMENT
COOPERATIVE LEARNING
COORDINATORS OF HANDICAPPED SERVICES
COURT LITIGATION
CREATIVE DEVELOPMENT
CREATIVE THINKING
CREATIVITY
CREATIVITY RESEARCH
CULTURAL DIFFERENCES
CURRICULUM BASED ASSESSMENT

DAILY LIVING SKILLS
DATA BASED INSTRUCTION
DEAF INTERPRETING
DEAF BLIND
DEAF SERVICE CENTERS
DEAFNESS
DEINSTITUTIONALIZATION (OF DISABLED)
DELAYED SPEECH
DELINQUENCY
DEPRESSION (PSYCHOLOGY)
DEVELOPMENTAL PSYCHOLOGY
DEVELOPMENTAL THERAPY
DEVELOPMENTAL DISABILITIES
DIABETES
DIAGNOSTIC TEACHING
DIALOGUE JOURNALS
DIFFERENTIAL DIPLOMAS
DIFFERENTIAL DIAGNOSIS
DISABLED PARENTS
DISABLED TEACHERS
DISADVANTAGED
DISADVANTAGED YOUTH
DISEASES
DOWNS SYNDROME
DRAMA THERAPY
DROPOUTS
DRUG THERAPY
DRUG ABUSE
DRUG ADDICTION
DUE PROCESS
DYSLEXIA

EARLY INTERVENTION
ECOLOGICAL PARADIGM
ECOLOGICAL ASSESSMENT
ECOLOGICAL MODEL (SPECIAL EDUCATION)
EDUCATION WORK RELATIONSHIP
EDUCATION ACT 1981 (ENGLAND)
EDUCATION OF THE HANDICAPPED AMENDMENTS (1986)
EDUCATIONAL DIAGNOSIS
EDUCATIONAL LEGISLATION
EDUCATIONALLY DISADVANTAGED
ELECTROMECHANICAL AIDS
EMOTIONAL ADJUSTMENT
EMOTIONAL DISTURBANCES
ENRICHMENT
ENRICHMENT ACTIVITIES
ENURESIS
EXCEPTIONAL PERSONS
EXCEPTIONAL CHILD RESEARCH
EXTREMELY GIFTED

FEDERAL LEGISLATION

GAZE PATTERNS
GIFTED
GIFTED DISABLED
GOVERNMENT ROLE
GROUP HOMES
GROUPING (INSTRUCTIONAL PURPOSES)

HANDICAP IDENTIFICATION
HANDICAPPED STUDENTS AS TUTORS
HANDICAPPED CHILDREN'S PROTECTION ACT

EC

HANDICAPPED AND GIFTED CHILDREN

APPLICABLE TERMS

HEAD INJURIES
HEALTH NEEDS
HEARING THERAPY
HEARING AIDS
HEARING IMPAIRMENTS
HEART DISORDERS
HELPING RELATIONSHIP
HIGH RISK PERSONS
HIGH ACHIEVEMENT
HIGH RISK STUDENTS
HOMEBOUND
HOSPITAL SCHOOLS
HOSPITALIZED CHILDREN
HYPERACTIVITY
HYPERTENSION

INCARCERATED YOUTH
INDEPENDENCE TRAINING
INDEPENDENT LIVING
INDIVIDUALIZED INSTRUCTION
INDIVIDUALIZED EDUCATION PROGRAMS
INDIVIDUALIZED FAMILY SERVICE PLANS
INDIVIDUALIZED TRANSITION PLANS
INJURIES
INSERVICE TEACHER EDUCATION
INSTITUTIONALIZED PERSONS
INSTRUCTIONAL EFFECTIVENESS
INSTRUCTIONAL MATERIALS
INSTRUCTIONAL MATERIAL ADAPTATION
INTELLIGENCE TESTS
INTELLIGIBILITY (SPEECH)
INTERMEDIATE CARE FACILITIES
INTERMITTENT REINFORCEMENT
INTERPERSONAL RELATIONSHIP
INTERPERSONAL COMPETENCE
INTERVENTION
ITINERANT TEACHERS

JOB COACHES

LABELING (OF PERSONS)
LANGUAGE HANDICAPS
LARCHE MOVEMENT
LARGE TYPE MATERIALS
LATERAL DOMINANCE
LEARNING DISABILITIES
LEARNING PROBLEMS
LEGAL RESPONSIBILITY
LIMITED ENGLISH SPEAKING
LISPING
LOW INCIDENCE DISABILITIES
LOW VISION AIDS

MAINSTREAMING
MANUAL RESTRAINT
MANUAL COMMUNICATION
MASTURBATION
MEDICAL SERVICES
MEDICALLY FRAGILE
MEMORY DEFICITS
MENTAL DISORDERS
MENTAL RETARDATION
MENTALLY RETARDED PARENTS
MILD MENTAL RETARDATION
MILD DISABILITIES
MINIMAL BRAIN DYSFUNCTION
MODERATE MENTAL RETARDATION
MULTIDOMAIN ASSESSMENT INSTRUMENTS
MULTIPLE DISABILITIES
MUSIC THERAPY

NEUROLOGICAL ORGANIZATION
NEUROLOGICAL IMPAIRMENTS
NEUROLOGY
NEUROPSYCHOLOGY
NEUROSIS
NONCATEGORICAL SPECIAL EDUCATION
NORMALIZATION (HANDICAPPED)

OCCUPATIONAL THERAPY

PARAPROFESSIONAL PERSONNNEL COMPETENCIES
PARENT ATTITUDES
PARENT TEACHER COOPERATION
PARENT ASSOCIATIONS
PARENT EDUCATION
PARENT SCHOOL RELATIONSHIP
PARENT CHILD RELATIONSHIP
PARTIAL HEARING
PARTIAL VISION
PEER RELATIONSHIP
PERCEPTUAL HANDICAPS
PERINATAL INFLUENCES
PERMANENCY PLANNING
PERSONAL COMMUNICATORS
PHYSICAL THERAPY
PHYSICAL MOBILITY
PHYSICAL THERAPISTS
PLAY THERAPY
POSITIONING (PATIENTS)
PRECISION TEACHING
PREFERENCE PATTERNS
PRENATAL INFLUENCES
PREREFERRAL CONSULTATION
PREREFERRAL ASSESSMENT
PREREFERRAL INTERVENTION
PREVENTION
PREVOCATIONAL EDUCATION
PROGRAM QUALITY INDICATORS
PROGRAM EFFECTIVENESS
PROGRAM EVALUATION
PROSTHESES

READING DIFFICULTIES
RECIPROCAL TEACHING
REGULAR AND SPECIAL EDUCATION RELATIONSHIP
REHABILITATION
REMEDIAL PROGRAMS
REMEDIAL TEACHERS
REMEDIAL READING
REMEDIAL INSTRUCTION
RESIDENTIAL CARE
RESIDENTIAL PROGRAMS
RESOURCE ROOM PROGRAMS
RESOURCE TEACHERS
RESPIRATORY DISABLED CHILDREN
RESPITE CARE
RUBELLA

SCHIZOPHRENIA
SCHOOL PHOBIA
SCREENING PROGRAMS
SEIZURES
SELF VERBALIZATION
SELF MANAGEMENT
SELF STIMULATION
SELF INSTRUCTION
SELF MONITORING
SELF INJURIOUS BEHAVIOR
SELF CARE SKILLS
SELF MUTILATION
SELF CONTROL
SENSORY AIDS
SERVICE UTILIZATION
SEVERE MENTAL RETARDATION
SEVERE DISABILITIES
SEVERITY (OF HANDICAP)
SEXUAL ABUSE
SHELTERED WORKSHOPS
SIGN LANGUAGE
SLOW LEARNERS
SOCIAL DISCRIMINATION
SOCIAL BIAS
SOCIAL INTEGRATION
SOCIAL ADJUSTMENT
SPECIAL EDUCATION
SPECIAL CLASSES
SPECIAL EDUCATION TEACHERS
SPECIAL HEALTH PROBLEMS
SPECIAL EDUCATION PLACEMENT TEAMS
SPECIAL NEEDS STUDENTS
SPECIAL SCHOOLS
SPEECH FLUENCY DYSFLUENCY
SPEECH PATHOLOGY
SPEECH THERAPY
SPEECH AND HEARING CLINICS
SPEECH HANDICAPS
SPINAL CORD INJURIES
STATE STANDARDS
STEREOTYPED BEHAVIOR
STRATEGIES INTERVENTION MODEL
STRATEGY TRAINING
STUDENT PLACEMENT STABILITY

HANDICAPPED AND GIFTED CHILDREN
APPLICABLE TERMS

STUDENT PLACEMENT TEAMS
STUDENT PLACEMENT
SUBSTANCE ABUSE
SUPPORTED EMPLOYMENT
SURROGATE PARENTS

TACTILE ADAPTATION
TACTUAL PERCEPTION
TALENT
TALENT IDENTIFICATION
TALENT DEVELOPMENT
TEACHER ATTITUDES
TEACHER BURNOUT
TEACHER CONSULTANTS
TEACHER ASSISTANCE TEAMS
TEACHING METHODS
TEST ADAPTATIONS
TEST BIAS
TIME DELAY
TRANSITIONAL PROGRAMS
TRANSITIONAL ACTIVITIES
TURN TAKING
TUTOR TRAINING

UNDERACHIEVEMENT
UNITED NATIONS DECADE OF DISABLED PERSONS

VELOPHARYNGEAL INCOMPETENCE
VENTILATOR DEPENDENT
VERBAL SELF INSTRUCTION
VISUAL PERCEPTION
VISUAL IMPAIRMENTS
VISUALLY HANDICAPPED MOBILITY
VOCAL TRACT
VOCATIONAL REHABILITATION
VOCATIONAL EDUCATION
VOICE SYNTHESIS
VOICE DISORDERS

WARNOCK REPORT
WHEELCHAIRS
WHOLE LANGUAGE APPROACH
WITHDRAWAL (PSYCHOLOGY)
WORD RETRIEVAL DIFFICULTIES

LANGUAGES AND LINGUISTICS (FL)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

- **Second language learning and instruction**
  in all commonly and uncommonly taught languages, including English as a second language (ESL). Within this area, includes: instructional methodology and materials; pedagogical research; teacher preparation; curriculum development; program design; evaluation and testing; and language education policy.

- **Bilingual education**
  including: needs assessment; program models; program design, implementation, and evaluation; instructional approaches and materials; teacher qualifications, preparation, and certification; student placement; language of instruction; native language instruction; English-as-a-second-language instruction; integration of language and content-area instruction; effects of bilingualism; bilingual education legislation; and intercultural communication.

- **Cultural education**
  in the context of second language learning. Includes the teaching of specific foreign cultures in the foreign language classroom, and the teaching of North American culture in the English-as-a-second-language classroom. Also includes intercultural communication, study abroad, and international educational exchange.

- **Linguistics**
  encompassing both theoretical and applied materials that have implications for instruction in the language sciences. The study of language in general, as well as the study of the structure of specific languages, both natural and artificial. This includes such areas as: (1) phonetics, phonology, morphology, syntax, and semantics; (2) sociolinguistics, including language variation and dialectology, language attitudes, language planning, pragmatics, discourse analysis, and other aspects of the social context of language use; (3) psycholinguistics, including all facets of language acquisition and processing in both first and additional languages, the physiology and psychology of language learning, memory and cognition as they relate to language acquisition and processing, and language handicaps.

II. EXPLANATORY NOTES

The acquisition of English as a native language, involving child language acquisition and development *outside the context of formal language instruction*, is within the scope of FL. The teaching and learning of English as a native language *in formal instructional settings* is covered by CS. Literacy education for adult native speakers of English is covered by CE. Literacy education for nonnative-English-speaking adults and out-of-school youth is covered by LE (an Adjunct Clearinghouse). FL covers documents on native language learning and instruction in all languages other than English.

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Bilingual education overlaps with the scope of several other clearinghouses, particularly in the areas of content instruction (e.g., mathematics, science, social studies) and populations served (e.g., urban, Mexican American, Asian American, handicapped). Documents in which the bilingual education context is secondary to the teaching of specific content are processed by the appropriate subject-area clearinghouse (e.g., SE, SO). Documents that focus on the special needs of a specific population in a bilingual education context are processed by the clearinghouse responsible for covering the population involved (e.g., UD, RC, EC). All other documents on bilingual education fall within the scope of FL.

III. BRIEF STATEMENT

Languages and language sciences. All aspects of second language instruction and learning in all commonly and uncommonly taught languages, including English as a second language. Bilingualism and bilingual education. Cultural education in the context of second language learning, including intercultural communication, study abroad, and international educational exchange. All areas of linguistics, including theoretical and applied linguistics, sociolinguistics, and psycholinguistics.

LANGUAGES AND LINGUISTICS
APPLICABLE TERMS

FL

ACCULTURATION
ACOUSTIC PHONETICS
ADJECTIVES
ADVERBS
AFFIXES
AFRICAN LANGUAGES
AFRIKAANS
AFRO ASIATIC LANGUAGES
ALASKA NATIVES
ALBANIAN
ALPHABETS
AMERICAN INDIAN CULTURE
AMERICAN INDIAN LANGUAGES
AMERICAN INDIANS
AMERICAN SIGN LANGUAGE
AMHARIC
ANTHROPOLOGICAL LINGUISTICS
APHASIA
APPLIED LINGUISTICS
ARABIC
ARABS
ARTICULATION (SPEECH)
ARTIFICIAL LANGUAGES
ASIAN AMERICANS
ATHAPASCAN LANGUAGES
AUDIOLINGUAL METHODS
AUDIOLINGUAL SKILLS
AUDITORY DISCRIMINATION
AUDITORY PERCEPTION
AUSTRALIAN ABORIGINAL LANGUAGES
AUSTRO ASIATIC LANGUAGES
AUTHENTIC MATERIALS

BALTIC LANGUAGES
BANTU LANGUAGES
BASIC VOCABULARY
BASQUE
BENGALI
BERBER LANGUAGES
BICULTURALISM
BIDIALECTALISM
BILINGUAL EDUCATION
BILINGUAL EDUCATION PROGRAMS
BILINGUAL INSTRUCTIONAL MATERIALS
BILINGUAL SCHOOLS
BILINGUAL STUDENTS
BILINGUAL TEACHER AIDES
BILINGUAL TEACHERS
BILINGUALISM
BLACK DIALECTS
BODY LANGUAGE
BULGARIAN
BURMESE
BUSINESS ENGLISH

CAMBODIAN
CAMBODIANS
CANADA NATIVES
CANTONESE
CAREGIVER SPEECH
CASE (GRAMMAR)
CAUCASIAN LANGUAGES
CHAD LANGUAGES
CHAMORRO
CHILD LANGUAGE
CHINESE
CHINESE AMERICANS
CHINESE CULTURE
CHINESE PEOPLE
CHOCTAW
CLASSICAL LANGUAGES
CLASSICAL LITERATURE
CLASSROOM COMMUNICATION
CLOZE PROCEDURE
CODE SWITCHING (LANGUAGE)
COHERENCE
COHESION (WRITTEN COMPOSITION)
COLLEGE SECOND LANGUAGE PROGRAMS
COMMUNICATION (THOUGHT TRANSFER)
COMMUNICATION APPREHENSION
COMMUNICATION PROBLEMS
COMMUNICATION SKILLS
COMMUNICATIVE COMPETENCE (LANGUAGES)
COMPUTATIONAL LINGUISTICS
CONSONANTS
CONTENT AREA READING
CONTENT AREA TEACHING
CONTENT AREA WRITING
CONTEXT CLUES
CONTRASTIVE LINGUISTICS
CONVERSATIONAL LANGUAGE COURSES
CREE
CREOLES
CROSS CULTURAL STUDIES
CROSS CULTURAL TRAINING
CUBANS
CULTURAL ACTIVITIES
CULTURAL AWARENESS
CULTURAL BACKGROUND
CULTURAL CONTEXT
CULTURAL DIFFERENCES
CULTURAL EDUCATION
CULTURAL ENRICHMENT
CULTURAL EXCHANGE
CULTURAL IMAGES
CULTURAL INFLUENCES
CULTURAL INTERRELATIONSHIPS
CULTURAL ISOLATION
CULTURAL PLURALISM
CULTURAL TRAITS
CULTURE
CULTURE CONFLICT
CULTURE CONTACT
CYRILLIC ALPHABET
CZECH
DANISH
DEAF INTERPRETING
DECODING (READING)
DEEP STRUCTURE
DEFINITIONS
DELAYED SPEECH
DESCRIPTIVE LINGUISTICS
DETERMINERS (LANGUAGES)
DEVELOPING NATIONS
DIACHRONIC LINGUISTICS
DIACRITICAL MARKING
DIALECT STUDIES
DIALECTS
DIALOG JOURNALS
DIALOGS (LANGUAGE)
DICTIONARIES
DIGLOSSIA
DISCOURSE ANALYSIS
DISTINCTIVE FEATURES (LANGUAGE)
DRAVIDIAN LANGUAGES
DRILLS (PRACTICE)
DUTCH
DYSLEXIA

ENGLISH
ENGLISH (SECOND LANGUAGE)
ENGLISH FOR ACADEMIC PURPOSES
ENGLISH FOR SCIENCE AND TECHNOLOGY
ENGLISH FOR SPECIAL PURPOSES
ERROR ANALYSIS (LANGUAGE)
ERROR CORRECTION
ERROR PATTERNS
ESKIMO ALEUT LANGUAGES
ESKIMOS
ESPERANTO
ETHNIC GROUPS
ETHNICITY
ETHNOGRAPHY
ETHNOLINGUISTICS
ETYMOLOGY
EXCHANGE PROGRAMS
EXPOSITORY WRITING
EXPRESSIVE LANGUAGE

FIGURATIVE LANGUAGE
FINGER SPELLING
FINNISH
FINNO UGRIC LANGUAGES
FLES
FOLK CULTURE
FOREIGN COUNTRIES
FOREIGN CULTURE
FOREIGN LANGUAGE BOOKS
FOREIGN LANGUAGE EXPERIENCE PROGRAMS
FOREIGN LANGUAGE FILMS
FOREIGN LANGUAGE PERIODICALS

FL

LANGUAGES AND LINGUISTICS
APPLICABLE TERMS

FOREIGN NATIONALS
FOREIGN STUDENTS
FORM CLASSES (LANGUAGES)
FRENCH
FRENCH CANADIANS
FRENCH LITERATURE
FUNCTION WORDS

GENERATIVE GRAMMAR
GENERATIVE PHONOLOGY
GEOLINGUISTICS
GERMAN
GERMAN LITERATURE
GRAMMAR
GRAMMAR TRANSLATION METHOD
GRAMMATICAL ACCEPTABILITY
GRAPHEMES

GREEK

HAITIAN CREOLE
HAITIANS
HAUSA
HAWAIIAN
HEBREW
HINDI
HISPANIC AMERICAN CULTURE
HISPANIC AMERICAN LITERATURE
HISPANIC AMERICANS
HMONG
HMONG PEOPLE
HUNGARIAN

IDEOGRAPHY
IDIOMS
IMMERSION PROGRAMS
IMMIGRANTS
INDIANS
INDIGENOUS POPULATIONS
INDO EUROPEAN LANGUAGES
INDOCHINESE
INDONESIAN
INDONESIAN LANGUAGES
INTENSIVE LANGUAGE COURSES
INTERCULTURAL COMMUNICATION
INTERCULTURAL PROGRAMS
INTERFERENCE (LANGUAGE)
INTERLANGUAGE
INTERNATIONAL EDUCATION
INTERNATIONAL EDUCATIONAL EXCHANGE
INTERNATIONAL PROGRAMS
INTERPRETERS
INTONATION
ITALIAN
ITALIAN LITERATURE

JAPANESE
JAPANESE PEOPLE
JARGON

KANNADA
KOREAN

LAND SETTLEMENT
LANGUAGE
LANGUAGE ACQUISITION
LANGUAGE APTITUDE
LANGUAGE ATTITUDES
LANGUAGE CLASSIFICATION
LANGUAGE CONTACT
LANGUAGE DOMINANCE
LANGUAGE ENRICHMENT
LANGUAGE ENROLLMENT
LANGUAGE EXPERIENCE APPROACH
LANGUAGE FLUENCY
LANGUAGE HANDICAPS
LANGUAGE LABORATORIES
LANGUAGE MAINTENANCE
LANGUAGE OF INSTRUCTION
LANGUAGE PATTERNS
LANGUAGE PLANNING
LANGUAGE PROCESSING
LANGUAGE PROFICIENCY
LANGUAGE RESEARCH
LANGUAGE RHYTHM
LANGUAGE ROLE
LANGUAGE SKILL ATTRITION
LANGUAGE SKILLS
LANGUAGE STANDARDIZATION
LANGUAGE STYLES
LANGUAGE TEACHERS
LANGUAGE TESTS
LANGUAGE TYPOLOGY
LANGUAGE UNIVERSALS
LANGUAGE USAGE
LANGUAGE VARIATION
LANGUAGES
LANGUAGES FOR SPECIAL PURPOSES
LAO
LAOTIANS
LATIN
LATIN AMERICAN CULTURE
LATIN AMERICAN LITERATURE
LATIN AMERICANS
LATIN LITERATURE
LETTERS (ALPHABET)
LETTERS (CORRESPONDENCE)
LEXICOGRAPHY
LEXICOLOGY
LIMITED ENGLISH SPEAKING
LINGUISTIC BORROWING
LINGUISTIC COMPETENCE
LINGUISTIC DIFFICULTY (INHERENT)
LINGUISTIC INPUT
LINGUISTIC PERFORMANCE
LINGUISTIC THEORY
LINGUISTICS
LISTENING COMPREHENSION
LISTENING COMPREHENSION TESTS
LISTENING SKILLS
LITERATURE
LITERATURE APPRECIATION

MACHINE TRANSLATION
MALAY
MALAYO POLYNESIAN LANGUAGES
MARATHI
MARKEDNESS
MAYAN LANGUAGES
MELANESIAN LANGUAGES
METALINGUISTICS
METAPHORS
MEXICAN AMERICANS
MEXICANS
MINORITY GROUPS
MISCUE ANALYSIS
MODERN LANGUAGE CURRICULUM
MODERN LANGUAGES
MONGOLIAN LANGUAGES
MONOLINGUALISM
MORPHEMES
MORPHOLOGY (LANGUAGES)
MORPHOPHONEMICS
MULTICULTURAL EDUCATION
MULTILEVEL CLASSES (SECOND LANGUAGE INSTRUCTION)
MULTILINGUAL MATERIALS
MULTILINGUALISM

NATIVE LANGUAGE INSTRUCTION
NATIVE SPEAKERS
NAVAJO
NEGATIVE FORMS (LANGUAGE)
NEUROLINGUISTICS
NON ENGLISH SPEAKING
NONNATIVE SPEAKERS
NONSTANDARD DIALECTS
NONVERBAL COMMUNICATION
NORTH AMERICAN CULTURE
NORTH AMERICAN ENGLISH
NORTH AMERICANS
NOTIONAL FUNCTIONAL SYLLABI
NOUNS

OFFICIAL LANGUAGES
OJIBWA
ORAL LANGUAGE
ORAL PROFICIENCY TESTING

PANJABI
PAPAGO
PARAGRAPHS
PARALINGUISTICS
PARSING
PASHTO
PATTERN DRILLS (LANGUAGE)
PERSIAN

LANGUAGES AND LINGUISTICS
APPLICABLE TERMS

FL

PERSUASIVE DISCOURSE
PHONEME GRAPHEME CORRESPONDENCE
PHONEMES
PHONEMIC ALPHABETS
PHONEMICS
PHONETIC ANALYSIS
PHONETIC TRANSCRIPTION
PHONETICS
PHONICS
PHONOLOGY
PHRASE STRUCTURE
PIDGINS
PLURALS
POLISH
PORTUGUESE
PRAGMATICS
PREFIXES (GRAMMAR)
PREPOSITIONS
PREWRITING
PRONOUNS
PRONUNCIATION
PRONUNCIATION INSTRUCTION
PSYCHOLINGUISTICS
PUERTO RICANS
PUNCTUATION

QUECHUA

READING
READING ACHIEVEMENT
READING COMPREHENSION
READING DIFFICULTIES
READING IMPROVEMENT
READING INSTRUCTION
READING MATERIAL SELECTION
READING MATERIALS
READING PROCESSES
READING RESEARCH
READING SKILLS
READING STRATEGIES
READING TESTS
RECEPTIVE LANGUAGE
REGIONAL DIALECTS
REQUESTS
REVISION (WRITTEN COMPOSITION)
RHETORIC
ROMANCE LANGUAGES
ROMANIZATION
RUMANIAN
RUSSIAN
RUSSIAN LITERATURE

SALISH
SAMOAN
SAMOYED LANGUAGES
SANSKRIT
SECOND LANGUAGE INSTRUCTION
SECOND LANGUAGE LEARNING
SECOND LANGUAGE PROGRAMS
SECOND LANGUAGES
SEMANTICS
SEMIOTICS
SEMITIC LANGUAGES
SENTENCE COMBINING
SENTENCE STRUCTURE
SENTENCES
SEXISM IN LANGUAGE
SHELTERED ENGLISH
SIGN LANGUAGE
SINGHALESE
SINO TIBETAN LANGUAGES
SLAVIC LANGUAGES
SLOVENIAN
SOCIAL DIALECTS
SOCIOLINGUISTICS
SPANISH
SPANISH CULTURE
SPANISH LITERATURE
SPANISH SPEAKING
SPEECH
SPEECH ACTS
SPEECH COMMUNICATION
SPEECH HABITS
SPEECH HANDICAPS
SPEECH SKILLS
SPELLING
SPELLING INSTRUCTION
STANDARD SPOKEN USAGE
STORY GRAMMAR
STRESS (PHONOLOGY)
STRUCTURAL ANALYSIS (LINGUISTICS)
STRUCTURAL GRAMMAR
STRUCTURAL LINGUISTICS
STUDENT EXCHANGE PROGRAMS
STUDY ABROAD
SUFFIXES
SUGGESTOPEDIA
SUMMARIZATION
SUPRASEGMENTALS
SURFACE STRUCTURE
SWAHILI
SWEDISH
SYLLABLES
SYNTAX

TAGALOG
TAMIL
TENSES (GRAMMAR)
THAI
TONE LANGUAGES
TRADITIONAL GRAMMAR
TRANSFORMATIONAL GENERATIVE GRAMMAR
TRANSLATION
TURKIC LANGUAGES
TURKISH
TWO WAY BILINGUAL EDUCATION

UKRAINIAN
UNCOMMONLY TAUGHT LANGUAGES
UNWRITTEN LANGUAGES
URALIC ALTAIC LANGUAGES
URBAN LANGUAGE
URDU
UTO AZTECAN LANGUAGES

VERBAL ABILITY
VERBAL COMMUNICATION
VERBAL DEVELOPMENT
VERBAL LEARNING
VERBAL TESTS
VERBS
VIETNAMESE
VIETNAMESE PEOPLE
VOCABULARY
VOCABULARY DEVELOPMENT
VOCABULARY SKILLS
VOCATIONAL ENGLISH (SECOND LANGUAGE)
VOWELS

WELSH
WESTERN CIVILIZATION
WH QUESTIONS
WHOLE LANGUAGE APPROACH
WORD FREQUENCY
WORD LISTS
WORD ORDER
WORD RECOGNITION
WORD STUDY SKILLS
WRITING (COMPOSITION)
WRITING DIFFICULTIES
WRITING EVALUATION
WRITING EXERCISES
WRITING IMPROVEMENT
WRITING INSTRUCTION
WRITING PROCESSES
WRITING RESEARCH
WRITING SKILLS
WRITTEN LANGUAGE

YIDDISH
YORUBA

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HIGHER EDUCATION (HE)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

Higher education is defined here as education beyond the secondary level that leads to a four-year bachelor's, masters', doctoral, or professional degree, and that includes courses and programs designed to enhance or update skills obtained in these degree programs. Of interest are all aspects of the conditions, programs, and problems at colleges and universities providing this level of education.

This includes the following topics, all in the context of higher education:

- Student (including foreign student) conditions, programs, and problems in colleges and universities;
- Academic advising;
- University and college faculty;
- Graduate and professional education; professional continuing education;
- Governance and the management of higher education institutions, including the application of corporate management techniques (e.g., systems analysis, computer simulation, organization theory);
- Legal issues;
- Financing;
- Planning and evaluation;
- Facilities--their structural design, management implications, and impact on the educational process;
- Curriculum and instructional problems, programs, and development;
- University extension programs;
- Inter-institutional arrangements and consortia;
- State and Federal programs and policies related to higher education, including "Master Plans,"
- Programs of religious and theological institutions of higher education;
- Institutional research and statistics on higher education as a social phenomenon, and its relationship to the society as a whole;

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- Comparative higher education;
- Distance education at the postsecondary level;
- International and intercultural higher education;
- Computers and telecommunications when applied to specific higher education instructional or administrative purposes;
- Business or industry educational programs leading to a degree.

II. EXPLANATORY NOTES

- CE Continuing education or professional education courses that lead to a degree or its equivalent, or that update degrees or professional certifications (including allied health occupations), are within the HE scope.
- CG Although CG covers counseling, guidance, and personnel services, HE covers *academic advising* (at the higher education level)
- EA
    1. Although general legal issues belong to EA, *legal issues peculiar to colleges and universities* are within the HE scope;
    2. Although the physical facilities of an academic institution are generally the concern of EA; the *interplay between facility design, maintenance, or use and the program of an institution* are of interest to HE.
- IR Although educational technology in general belongs to IR, systems analysis and computer assisted learning, when treated as an aspect of higher education management, planning, or means of instruction, belong to HE.
- RC/UD Materials dealing primarily with designated minority groups, such as American Indians, Mexican Americans, or Puerto Ricans, who are coincidentally college/university students, are referred to RC or UD as appropriate.

III. BRIEF STATEMENT

All aspects of the conditions, programs, and problems at colleges and universities providing higher education (i.e., four-year degrees and beyond). This includes: governance and management; planning; finance; inter-institutional arrangements; business or industry programs leading to a degree; institutional research at the college/university level; Federal programs; legal issues and legislation; professional education (e.g., medicine, law, etc.) and professional continuing education.

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HIGHER EDUCATION
APPLICABLE TERMS

HE

ACADEMIC ACHIEVEMENT
ACADEMIC ADVISING
ACADEMIC ASPIRATION
ACADEMIC FREEDOM
ACADEMIC PERSISTENCE
ACADEMIC RANK PROFESSIONAL
ACADEMIC STANDARDS
ACCESS TO EDUCATION
ACCOUNTABILITY
ACCREDITATION (INSTITUTIONS)
ADMINISTRATIVE POLICY
ADMINISTRATOR ATTITUDES
ADMINISTRATOR CHARACTERISTICS
ADMINISTRATOR ROLE
ADMISSION CRITERIA
ADULT STUDENTS
AFFIRMATIVE ACTION
ALUMNI
AMERICAN INDIANS
ARTICULATION EDUCATION
ATHLETES
ATTITUDES

BACHELORS DEGREE
BLACK COLLEGES
BLACK STUDENTS
BLACKS

CAMPUS PLANNING
CASE STUDIES
CHURCH RELATED COLLEGES
COGNITIVE PROCESS
COLLECTIVE BARGAINING
COLLEGE ADMINISTRATION
COLLEGE ADMISSION
COLLEGE APPLICANTS
COLLEGE ATHLETICS
COLLEGE ATTENDANCE
COLLEGE BUILDINGS
COLLEGE CHOICE
COLLEGE CREDITS
COLLEGE CURRICULUM
COLLEGE ENTRANCE EXAMINATIONS
COLLEGE ENVIRONMENT
COLLEGE FACULTY
COLLEGE FRESHMEN
COLLEGE GRADUATES
COLLEGE INSTRUCTION
COLLEGE PLANNING
COLLEGE PREPARATION
COLLEGE PRESIDENTS
COLLEGE PROGRAMS
COLLEGE ROLE
COLLEGE STUDENTS
COLLEGES
COMMUNITY COLLEGES
COMPARATIVE EDUCATION
COMPUTER ASSISTED INSTRUCTION
CONFLICT RESOLUTION
CONTINUING EDUCATION
COOPERATIVE PROGRAMS
CORE CURRICULUM
COST EFFECTIVENESS
COSTS
COURSE CONTENT
COURSE DESCRIPTIONS
COURSE EVALUATION
CRITICAL THINKING
CURRICULUM DESIGN
CURRICULUM DEVELOPMENT

DEANS
DECISION MAKING
DECLINING ENROLLMENT
DEGREE REQUIREMENTS
DEGREES ACADEMIC
DEMOGRAPHY
DENTAL SCHOOLS
DENTAL STUDENTS
DEVELOPING NATIONS
DISTANCE EDUCATION
DOCTORAL DEGREES
DOCTORAL PROGRAMS

EDUCATIONAL ASSESSMENT
EDUCATIONAL FINANCE
EDUCATIONAL IMPROVEMENT
EDUCATIONAL NEEDS
EDUCATIONAL OPPORTUNITIES
EDUCATIONAL TRENDS
EDUCATIONAL POLICY
EDUCATIONAL QUALITY
EDUCATIONAL RESEARCH
ENDOWMENT FUNDS
ENGINEERING EDUCATION
ENROLLMENT
ENROLLMENT INFLUENCES
ENROLLMENT PROJECTIONS
ENROLLMENT TRENDS
ETHNIC GROUPS
EVALUATION CRITERIA
EVALUATION METHODS
EXTRACURRICULAR ACTIVITIES

FACULTY ADVISERS
FACULTY COLLEGE RELATIONSHIP
FACULTY DEVELOPMENT
FACULTY EVALUATION
FEDERAL LEGISLATION
FACULTY PROMOTION
FACULTY WORKLOAD
FINANCIAL AID APPLICANTS
FINANCIAL NEEDS
FINANCIAL PROBLEMS
FOREIGN COUNTRIES
FOREIGN STUDENTS
FULL TIME FACULTY
FUND RAISING
GENERAL EDUCATION
GOVERNANCE
GOVERNING BOARDS
GOVERNMENT SCHOOL RELATIONSHIP
GRADE POINT AVERAGE
GRADUATE MEDICAL EDUCATION
GRADUATE STUDENTS
GRADUATE STUDY
GRADUATE SURVEYS
GRIEVANCE PROCEDURES

HIGH RISK STUDENT
HIGHER EDUCATION
HISPANIC AMERICANS
HUMANITIES

IN STATE STUDENTS
INSTITUTIONAL CHARACTERISTICS
INSTITUTIONAL EVALUATION
INSTITUTIONAL MISSION
INSTITUTIONAL RESEARCH
INTELLECTUAL DISCIPLINES
INTERCOLLEGIATE COOPERATION

JOB SATISFACTION

KNOWLEDGE LEVEL

LAW SCHOOLS
LEAVE OF ABSENCE
LEGAL EDUCATION
LIBERAL ARTS
LOAN REPAYMENT
LONG RANGE PLANNING

MAJOR STUDENTS
MASTERS DEGREES
MEDICAL EDUCATION
MEDICAL SCHOOL FACULTY
MEDICAL SCHOOLS
MEDICAL STUDENTS
MENTORS
MINORITY GROUPS

NEED ANALYSIS STUDENT FINANCIAL AID
NONTRADITIONAL EDUCATION
NONTRADITIONAL STUDENTS
NURSING EDUCATION

ORGANIZATIONAL CHANGE
ORGANIZATIONAL CLIMATE
OUT OF STATE STUDENTS
OUTCOMES OF EDUCATION

PARENT FINANCIAL CONTRIBUTION
PART TIME FACULTY
PART TIME STUDENTS
PARTICIPATIVE DECISION MAKING

HE	HIGHER EDUCATION *APPLICABLE TERMS*

PAYING FOR COLLEGE
PEER EVALUATION
PHARMACEUTICAL EDUCATION
POLICY FORMATION
POSTSECONDARY EDUCATION
PRIVATE COLLEGES
PROFESSIONAL CONTINUING EDUCATION
PROFESSIONAL EDUCATION
PROGRAM CHARACTERISTIS
PROGRAM DEVELOPMENT
PROGRAM EVALUATION
PROGRAM IMPLEMENTATION
PUBLIC COLLEGES

RESEARCH AND DEVELOPMENT
RESEARCH METHODOLOGY
RESEARCH UNIVERSITIES
RESEARCH UTILIZATION
RESOURCE ALLOCATION
ROLE PERCEPTION

SALARIES
SCHOLARSHIPS
SCHOOL BUSINESS RELATIONSHIP
SCHOOL COMMUNITY RELATIONSHIP
SCHOOL HOLDING POWER
SMALL COLLEGES
STAFF DEVELOPMENT
STATE AID
STATE COLLEGES
STATE UNIVERSITIES
STUDENT ADJUSTMENT
STUDENT ATTITUDES
STUDENT ATTRITION
STUDENT CHARACTERISTICS
STUDENT COLLEGE RELATIONSHIP
STUDENT COSTS
STUDENT DEVELOPMENT
STUDENT EVALUATION
STUDENT FINANCIAL AID
STUDENT LOAN PROGRAMS
STUDENT NEEDS
STUDENT PLACEMENT
STUDENT PERSONNEL SERVICES
STUDENT RECRUITMENT
STUDY ABROAD

TEACHER CHARACTERISTICS
TEACHER EFFECTIVENESS
TEACHING ASSISTANTS
TEACHING HOSPITALS
TENURE
TREND ANALYSIS
TUITION
TWO YEAR COLLEGES

UNDERGRADUATE STUDENTS
UNDERGRADUATE STUDY
UNIVERSITIES

WOMEN FACULTY
WOMENS EDUCATION

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INFORMATION RESOURCES (IR)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

Educational media and technology and library/information sciences are covered at all levels of education, including the professional preparation of educational technologists, librarians, and information specialists for education-related responsibilities.

- **Educational Technology.**
  The emphasis in this field is placed on the design, development, and evaluation of instruction and learning. All aspects of media and technology, as they are applied to teaching and learning, are covered, including the delivery of instruction via computers, microcomputers, telecommunications (cable, broadcast, satellite), films, radio, television, videodiscs, and other audiovisual media or devices. Techniques covered include, among others, computer-assisted and computer-managed instruction, simulation and gaming, mastery learning, and programmed instruction. Those aspects of distance education that are concerned with the design and delivery of instructional materials for this type of education are also covered.

- **Library/Information Science**
  The focus in this field is on the management, operation, and use of libraries and information centers of all types (school, academic, special, public, etc.) in the performance of their educational mission. Among the topics covered in this context are: facilities; personnel; planning; media selection, acquisition, and organization; library automation; networking; learning resource centers; information literacy, bibliographic instruction, and information skills instruction; censorship; copyright; information resource management (IRM); access to information (physical, theoretical, technical, and political); information processing, storage, and retrieval.

- **Information Technology**
  May apply to either or both fields above and includes the storage, processing, and delivery of information by such means as electronic networks, teleconferencing, computer conferencing, online searching, and computer-based information systems.

II. EXPLANATORY NOTES

Many documents and articles within the scope of IR may overlap with the scopes of other clearinghouses. Most of these items feature *primary* and *secondary* themes. If the *primary focus* of an item is on the subject matter and/or special populations, the item should be handled by the appropriate subject matter or special population clearinghouse. If the primary focus is on the process of design, delivery, and evaluation of instruction, or the access, use, and management of library and information systems, *regardless of the field or special population*, the item is within the scope of IR.

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III. BRIEF STATEMENT

Educational technology (with emphasis on instructional design, development, and evaluation) and library/information science at all academic levels and with all populations, including the preparation of professionals. The media and devices of educational communications: computers and microcomputers, telecommunications (cable, broadcast satellite), audio and video recordings, film and other audiovisual materials, as they pertain to teaching and learning (in both conventional and distance education settings). The operation and management of libraries and information services for education-related organizations, including acquisition and organization of materials, automation, access, censorship, and information storage and retrieval. All aspects of information management and information technology related to education.

INFORMATION RESOURCES

APPLICABLE TERMS

IR

ABSTRACTS
ACADEMIC LIBRARIES
ACCESS TO INFORMATION
ADOLESCENT LITERATURE
ADOPTION (IDEAS)
ADVANCE ORGANIZERS
AFFECTIVE MEASURES
ALGORITHMS
ANIMATION
ANNOTATED BIBLIOGRAPHIES
APPROPRIATE TECHNOLOGY
APTITUDE TREATMENT INTERACTION
ARCHIVES
ARTIFICIAL INTELLIGENCE
AUDIO EQUIPMENT
AUDIODISKS
AUDIOTAPE RECORDINGS
AUDIOVISUAL AIDS
AUDIOVISUAL CENTERS
AUDIOVISUAL COMMUNICATIONS
AUDIOVISUAL COORDINATORS
AUDIOVISUAL INSTRUCTION
AUTHORING AIDS (PROGRAMING)
AUTOMATIC INDEXING

BEHAVIORAL OBJECTIVES
BIBLIOGRAPHIC DATABASES
BIBLIOGRAPHIC RECORDS
BIBLIOGRAPHIC UTILITIES
BIBLIOGRAPHIES
BIBLIOMETRICS
BOOKMOBILES
BOOKS
BRANCH LIBRARIES
BRANCHING
BROADCAST TELEVISION
BULLETIN BOARDS

CABLE TELEVISION
CALCULATORS
CARD CATALOGS
CASE STUDIES
CATALOGING
CENSORSHIP
CHANGE AGENTS
CHANGE STRATEGIES
CHECKLISTS
CHILDRENS LITERATURE
CHILDRENS TELEVISION
CITATION ANALYSIS
CITATIONS (REFERENCES)
CLASSIFICATION
CLASSROOM DESIGN
CLASSROOM ENVIRONMENT
CLASSROOM FURNITURE
CLASSROOM TECHNIQUES
CLEARINGHOUSES
CLIMATE CONTROL
COGNITIVE MAPPING
COGNITIVE PROCESSES
COGNITIVE PSYCHOLOGY
COGNITIVE STRUCTURES
COGNITIVE STYLE
COLLEGE LIBRARIES
COLOR
COMMERCIAL TELEVISION
COMMUNICATION (THOUGHT TRANSFER)
COMMUNICATION SKILLS
COMMUNICATIONS SATELLITES
COMMUNITY INFORMATION SERVICES
COMPETENCE
COMPUTATIONAL LINGUISTICS
COMPUTER ASSISTED INSTRUCTION
COMPUTER ASSISTED TESTING
COMPUTER CENTERS
COMPUTER GAMES
COMPUTER GRAPHICS
COMPUTER LITERACY
COMPUTER MANAGED INSTRUCTION
COMPUTER NETWORKS
COMPUTER ORIENTED PROGRAMS
COMPUTER PRINTERS
COMPUTER SCIENCE
COMPUTER SCIENCE EDUCATION
COMPUTER SIMULATION
COMPUTER SOFTWARE
COMPUTER SOFTWARE REVIEWS
COMPUTER STORAGE DEVICES
COMPUTER SYSTEM DESIGN
COMPUTER TERMINALS
COMPUTER USES IN EDUCATION
COMPUTERS
CONCEPT FORMATION
CONCEPT TEACHING
CONSULTANTS
CONVENTIONAL INSTRUCTION
COOPERATIVE PLANNING
COPYRIGHTS
COURSE EVALUATION
COURSE INTEGRATED LIBRARY INSTRUCTION
COURSEWARE
CRITERION REFERENCED TESTS
CUES
CURRICULUM DESIGN
CURRICULUM DEVELOPMENT
CURRICULUM ENRICHMENT
CURRICULUM EVALUATION
CYBERNETICS

DATABASE DESIGN
DATABASE MANAGEMENT SYSTEMS
DATABASE PRODUCERS
DATABASES
DELIVERY SYSTEMS
DEMONSTRATION PROGRAMS
DEPOSITORY LIBRARIES
DESIGN PREFERENCES
DESIGN REQUIREMENTS
DESKTOP PUBLISHING
DIAGNOSTIC TEACHING
DIFFUSION (COMMUNICATION)
DISCOGRAPHIES
DISCOVERY LEARNING
DISK DRIVES
DISPLAY SYSTEMS
DISTANCE EDUCATION
DOCUMENTATION
DRILLS (PRACTICE)

EDITING
EDITORS
EDUCATIONAL CHANGE
EDUCATIONAL FACILITIES PLANNING
EDUCATIONAL GAMES
EDUCATIONAL IMPROVEMENT
EDUCATIONAL INNOVATION
EDUCATIONAL MEDIA
EDUCATIONAL OBJECTIVES
EDUCATIONAL PHILOSOPHY
EDUCATIONAL PLANNING
EDUCATIONAL RADIO
EDUCATIONAL RESOURCES
EDUCATIONAL TECHNOLOGY
EDUCATIONAL TELEVISION
EDUCATIONAL THEORIES
ELECTRONIC EQUIPMENT
ELECTRONIC MAIL
ELECTRONIC PUBLISHING
ENCODING (PSYCHOLOGY)
EPISTEMOLOGY
EQUAL EDUCATION
EQUIPMENT EVALUATION
EQUIPMENT STANDARDS
ERROR PATTERNS
EVALUATION
EVALUATION CRITERIA
EVAULATION METHODS
EVAULATION PROBLEMS
EVALUATION UTILIZATION
EVALUATIVE THINKING
EXHIBITS
EXPERIENTIAL LEARNING
EXPERT SYSTEMS

FACSIMILE TRANSMISSION
FACULTY DEVELOPMENT
FEEDBACK
FIELD DEPENDENCE INDEPENDENCE
FIELD TESTS
FILM PRODUCTION
FILMS
FLOPPY DISKS
FLOW CHARTS
FORMATIVE EVALUATION
FREEDOM OF INFORMATION
FULL TEXT DATABASES

IR

INFORMATION RESOURCES
APPLICABLE TERMS

GAME THEORY
GAMES
GATEWAY SYSTEMS
GLOSSARIES
GOVERNMENT LIBRARIES
GOVERNMENT PUBLICATIONS

HEURISTICS
HISPANIC AMERICAN LITERATURE
HOSPITAL LIBRARIES
HUMAN FACTORS ENGINEERING

ILLUSTRATIONS
IMPROVEMENT PROGRAMS
INDEPENDENT STUDY
INDEXES
INDEXING
INDIVIDUAL CHARACTERISTICS
INDIVIDUAL DIFFERENCES
INDIVIDUAL NEEDS
INDIVIDUALIZED INSTRUCTION
INDUSTRIAL TRAINING
INFORMATION CENTERS
INFORMATION DISSEMINATION
INFORMATION MANAGEMENT
INFORMATION NEEDS
INFORMATION NETWORKS
INFORMATION PROCESSING
INFORMATION RETRIEVAL
INFORMATION SCIENCE
INFORMATION SCIENTISTS
INFORMATION SEEKING
INFORMATION SERVICES
INFORMATION SOURCES
INFORMATION STORAGE
INFORMATION SYSTEMS
INFORMATION TECHNOLOGY
INFORMATION THEORY
INFORMATION TRANSFER
INFORMATION UTILIZATION
INPUT OUTPUT DEVICES
INSERVICE TEACHER EDUCATION
INSTITUTIONAL COOPERATION
INSTITUTIONAL DESIGN
INSTITUTIONAL LIBRARIES
INSTRUCTIONAL DEVELOPMENT
INSTRUCTIONAL EFFECTIVENESS
INSTRUCTIONAL FILMS
INSTRUCTIONAL IMPROVEMENT
INSTRUCTIONAL INNOVATION
INSTRUCTIONAL MATERIAL EVALUATION
INSTRUCTIONAL MATERIALS
INSTRUCTIONAL SYSTEMS
INTEGRATED LIBRARY SYSTEMS
INTELLECTUAL FREEDOM
INTELLECTUAL PROPERTY
INTERACTION
INTERACTIVE VIDEO
INTERDISCIPLINARY APPROACH
INTERLIBRARY LOANS
INTERMODE DIFFERENCES
INTERPERSONAL COMMUNICATION
INTERPROFESSIONAL RELATIONSHIP
ITEMBANKS

KEYBOARDING (DATA ENTRY)
KNOWLEDGE LEVEL

LABORATORIES
LARGE GROUP INSTRUCTION
LAW LIBRARIES
LEADERSHIP STYLES
LEARNING ACTIVITIES
LEARNING LABORATORIES
LEARNING MODULES
LEARNING PROCESSES
LEARNING RESOURCES CENTERS
LEARNING STRATEGIES
LEARNING THEORIES
LEXICOGRAPHY
LIBRARIANS
LIBRARIES
LIBRARY ACQUISITION
LIBRARY ADMINISTRATION
LIBRARY ASSOCIATIONS
LIBRARY AUTOMATION
LIBRARY CATALOGS
LIBRARY CIRCULATION
LIBRARY COLLECTION DEVELOPMENT
LIBRARY COLLECTIONS
LIBRARY COOPERATION
LIBRARY EDUCATION
LIBRARY EQUIPMENT
LIBRARY EXPENDITURES
LIBRARY EXTENSION
LIBRARY FACILITIES
LIBRARY GUIDES
LIBRARY INSTRUCTION
LIBRARY MATERIALS
LIBRARY MATERIAL SELECTION
LIBRARY NETWORKS
LIBRARY PERSONNEL
LIBRARY PLANNING
LIBRARY RESEARCH
LIBRARY ROLE
LIBRARY SCHOOLS
LIBRARY SCIENCE
LIBRARY SERVICES
LIBRARY SKILLS
LIBRARY STANDARDS
LIBRARY STATISTICS
LIBRARY SURVEYS
LIBRARY TECHNICAL PROCESSES
LIBRARY TECHNICIANS
LIFELONG LEARNING
LIGHTING
LINKING AGENTS
LOCAL AREA NETWORKS
LOCUS OF CONTROL
LOGICAL THINKING
LONG TERM MEMORY

MACHINE READABLE CATALOGING
MANAGEMENT GAMES
MANAGEMENT INFORMATION SYSTEMS
MANAGEMENT SYSTEMS
MAN MACHINE SYSTEMS
MASTERY LEARNING
MATERIAL DEVELOPMENT
MATHEMATICAL MODELS
MEASUREMENT TECHNIQUES
MEDIA ADAPTATION
MEDIA RESEARCH
MEDIA SELECTION
MEDIA SPECIALISTS
MEDICAL LIBRARIES
MENU DRIVEN SOFTWARE
META ANALYSIS
METACOGNITION
MINICOMPUTERS
MINIMUM COMPETENCIES
MOTIVATION TECHNIQUES
MULTIMEDIA INSTRUCTION
MICROCOMPUTERS
MICROFICHE
MICROFORMS
MICROREPRODUCTION
MICROTEACHING
MODELS
MODEMS
MUSEUMS

NATIONAL LIBRARIES
NEEDS ASSESSMENT
NETWORKS
NONPRINT MEDIA
NUMERIC DATABASES

OBJECTIVES
OFFICE AUTOMATION
ONLINE CATALOGS
ONLINE SEARCHING
ONLINE SYSTEMS
ONLINE VENDORS
OPEN UNIVERSITIES
OPTICAL DATA DISKS
OPTICAL DISKS
ORAL HISTORY
OUTREACH PROGRAMS

PACING
PARAPROFESSIONAL PERSONNEL
PERFORMANCE FACTORS
PHOTOGRAPHIC EQUIPMENT
PHOTOGRAPHS
PHOTOGRAPHY
POLICY
POLICY FORMATION
PREDICTIVE MEASUREMENT

880

INFORMATION RESOURCES
APPLICABLE TERMS

PREDICTOR VARIABLES
PRESERVATION
PRIMARY SOURCES
PRIOR LEARNING
PRISON LIBRARIES
PRIVACY
PROBLEM SOLVING
PRODUCTION TECHNIQUES
PROFESSIONAL CONTINUING EDUCATION
PROFESSIONAL DEVELOPMENT
PROFESSIONAL PERSONNEL
PROFESSIONAL TRAINING
PROGRAM DEVELOPMENT
PROGRAM EFFECTIVENESS
PROGRAM EVALUATION
PROGRAM IMPLEMENTATION
PROGRAMED INSTRUCTION
PROGRAMED INSTRUCTIONAL MATERIALS
PROGRAMED TUTORING
PROGRAMING
PROGRAMING (BROADCAST)
PROGRAMING LANGUAGES
PROJECTION EQUIPMENT
PROMPTING
PUBLIC LIBRARIES
PUBLIC RELATIONS
PUBLIC TELEVISION
PUBLISHING INDUSTRY

QUESTIONING TECHNIQUES

RADIO
REACTION TIME
READING PROGRAMS
RECALL (PSYCHOLOGY)
RECORDS MANAGEMENT
REFERRAL
REFERENCE MATERIALS
REFERENCE SERVICES
REGIONAL LIBRARIES
REINFORCEMENT
RELEVANCE (INFORMATION RETRIEVAL)
RELIABILITY
REMEDIAL INSTRUCTION
REPROGRAPHY
RESEARCH NEEDS
RESEARCH UTILIZATION
RESOURCE CENTERS
RESOURCE MATERIALS
REVISION (WRITTEM COMPOSITION)
ROBOTICS
ROLE PLAYING

SCHEMATA (COGNITION)
SCHOLARLY JOURNALS
SCHOOL LIBRARIES
SCHOOL SURVEYS
SCIENTIFIC AND TECHNICAL INFORMATION
SCREENS (DISPLAYS)
SCRIPTS
SEARCH STRATEGIES
SELECTIVE DISSEMINATION OF INFORMATION
SEQUENTIAL APPROACH
SEQUENTIAL LEARNING
SHARED FACILITIES
SHARED LIBRARY RESOURCES
SHARED RESOURCES AND SERVICES
SHORT TERM MEMORY
SIMULATED ENVIRONMENT
SIMULATION
SKILL ANALYSIS
SKILL DEVELOPMENT
SLIDES
SMALL GROUP INSTRUCTION
SOUND EFFECTS
SPATIAL ABILITY
SPECIAL LIBRARIES
SPEECH SYNTHESIZERS
STAFF DEVELOPMENT
STANDARDS
STATE CURRICULUM GUIDES
STATE LIBRARIES
STORYTELLING
STUDENT ATTITUDES
STUDENT MOTIVATION
STUDENT REACTION
STUDENT ROLE
STUDY GUIDES
SUBJECT INDEX TERMS
SUMMATIVE EVALUATION
SYSTEMS ANALYSIS
SYSTEMS APPROACH
SYSTEMS DEVELOPMENT

TASK ANALYSIS
TEACHER ATTITUDES
TEACHER DEVELOPED MATERIALS
TEACHER ROLE
TEACHING MACHINES
TEACHING METHODS
TEACHING MODELS
TEAM TEACHING
TEAMWORK
TECHNOLOGICAL ADVANCEMENT
TECHNOLOGICAL LITERACY
TECHNOLOGY
TECHNOLOGY TRANSFER
TELECOMMUNICATIONS
TELECONFERENCING
TELECOURSES
TELEPHONE COMMUNICATIONS SYSTEMS
TELEPHONE INSTRUCTION
TELEVISION COMMERCIALS
TELEVISION RESEARCH
TELEVISION SURVEYS
TELEVISION VIEWING
THEORY PRACTICE RELATIONSHIP
THESAURI
THREE DIMENSIONAL AIDS
TIME FACTORS (LEARNING)
TIME ON TASK
TIME SHARING
TRAINING METHODS
TRAINING OBJECTIVES
TRANSFER OF TRAINING
TRUSTEES

UNION CATALOGS
UNITS OF STUDY
USE STUDIES
USER NEEDS (INFORMATION)
USERS (INFORMATION)
USER SATISFACTION (INFORMATION)
USE STUDIES

VALIDATED PROGRAMS
VIDEO EQUIPMENT
VIDEODISKS
VIDEOTAPE CASSETTES
VIDEOTAPE RECORDERS
VIDEOTAPE RECORDINGS
VIDEOTEX
VISUAL AIDS
VISUAL LEARNING
VISUAL LITERACY
VISUALIZATION

WORD PROCESSING

JUNIOR COLLEGES (JC)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

Two-year colleges, including public and private community and junior colleges, technical institutes, and branch university campuses, that offer the associate degree in arts, sciences, or applied sciences as their highest degree. Includes the following areas, as they pertain to such institutions:

(1) Organization, administration, finance, governance, role and mission, and futures;

(2) Characteristics, needs, and roles of students, faculty, administrators, and trustees;

(3) Preparation, development, and evaluation of staff/faculty;

(4) Curricula, teaching methods, and programs (including general education, transfer, occupational, community service, and developmental studies programs);

(5) Linkages and relationships with business/industry/community and articulation with secondary schools and four-year institutions;

(6) Methodologies of research applied to two-year colleges;

(7) Libraries, learning resource centers, and other student services.

II. EXPLANATORY NOTES

Items are considered to be within the scope of JC when their orientation or focus is on the two-year college. In cases where a document's content overlaps with another Clearinghouse's scope, the item's emphasis determines its disposition for processing. For example, documents dealing with: handicapped or minority populations at two-year colleges; counseling services within two-year colleges; vocational or adult education programs at two-year colleges; library services or the use of educational technology at two-year institutions; and the administration of two-year colleges, are all considered within the JC scope. Discipline-related documents (e.g., those dealing with foreign language instruction, reading, social studies, etc.) are generally transferred to the appropriate subject-oriented clearinghouse, unless the two-year college applications of the materials are especially stressed in the document. Materials dealing with all aspects of postsecondary education, including *both* two- and four-year colleges, will be processed by JC or transferred to the HE Clearinghouse, dependent upon the emphasis of the documents.

JUNIOR COLLEGES (JC)

III. BRIEF STATEMENT

Development, administration, and evaluation of two-year public and private community and junior colleges, technical institutes, and two-year branch university campuses. Two-year college students, faculty, staff, curricula, programs, support services, libraries, and community services. Linkages between two-year colleges and business/industrial/community organizations. Articulation of two-year colleges with secondary and four-year postsecondary institutions.

JUNIOR COLLEGES
APPLICABLE TERMS

JC

ACADEMIC ACHIEVEMENT
ACADEMIC ADVISING
ACADEMIC DEANS
ACADEMIC PERSISTENCE
ACADEMIC STANDARDS
ACCESS TO EDUCATION
ACCREDITATION (INSTITUTIONS)
ADJUNCT FACULTY
ADMINISTRATIVE ORGANIZATION
ADMINISTRATOR ATTITUDES
ADMINISTRATOR EFFECTIVENESS
ADMINISTRATOR EVALUATION
ADMINISTRATOR RESPONSIBILITY
ADMINISTRATOR ROLE
ADMINISTRATORS
ADULT BASIC EDUCATION
ADULT EDUCATION
ADULT STUDENTS
ADVISORY COMMITTEES
AFFIRMATIVE ACTION
AGING IN ACADEMIA
ALLIED HEALTH OCCUPATIONS EDUCATION
ALUMNI
ANDRAGOGY
ARTICULATION (EDUCATION)
ASSOCIATE DEGREES

BASIC SKILLS
BLACK STUDENTS
BOARD ADMINISTRATOR RELATIONSHIP
BUDGETS/BUDGETING
BUSINESS EDUCATION

CAMPUS PLANNING
CAREER COUNSELING
COLLECTIVE BARGAINING
COLLEGE PRESIDENTS
COLLEGE BUILDINGS
COLLEGE TRANSFER STUDENTS
COLLEGE CREDITS
COLLEGE CHOICE
COLLEGE ADMISSION
COLLEGE GOVERNING COUNCILS
COLLEGE FRESHMEN
COLLEGE PLANNING
COLLEGE ADMINISTRATOR
COLLEGE APPLICANTS
COLLEGE CURRICULUM
COLLEGE ATTENDANCE
COLLEGE ENVIRONMENT
COLLEGE INSTRUCTION
COLLEGE LIBRARIES
COLLEGE ROLE
COLLEGE PROGRAMS
COLLEGE BOUND STUDENTS
COLLEGE SCHOOL COOPERATION
COLLEGE GRADUATES
COLLEGE FACULTY
COLLEGE ADMINISTRATION
COMMUNITY EDUCATION
COMMUNITY COLLEGES
COMMUNITY SERVICES
COMMUTER COLLEGES
COMMUTING STUDENTS
COMPARATIVE ANALYSIS
COMPENSATORY EDUCATION
COMPETENCY BASED EDUCATION
COMPUTER ASSISTED INSTRUCTION
COMPUTER ORIENTED PROGRAMS
CONTINUING EDUCATION
COOPERATIVE EDUCATION
COOPERATIVE PROGRAMS
COST EFFECTIVENESS
COURSE SELECTION (STUDENTS)
COURSE CONTENT
COURSE DESCRIPTIONS
CREDIT COURSES
CRITICAL THINKING
CURRICULUM EVALUATION
CURRICULUM GUIDES
CURRICULUM DEVELOPMENT

DAY STUDENTS
DEANS
DECLINING ENROLLMENT
DEGREE REQUIREMENTS
DEGREES (ACADEMIC)
DEMOGRAPHY
DEPARTMENT HEADS
DEPARTMENTS
DEVELOPMENTAL STUDIES PROGRAMS
DIAGNOSTIC TESTING
DISTANCE EDUCATION
DROPOUT PREVENTION
DROPOUT RESEARCH
DROPOUTS

ECONOMIC DEVELOPMENT
EDUCATION WORK RELATIONSHIP
EDUCATIONAL ASSESSMENT
EDUCATIONAL DEVELOPMENT
EDUCATIONAL EQUITY (FINANCE)
EDUCATIONAL FINANCE
EDUCATIONAL INNOVATION
EDUCATIONAL OBJECTIVES
EDUCATIONAL PLANNING
EDUCATIONAL TELEVISION
EDUCATIONALLY DISADVANTAGED
EMPLOYMENT PROGRAMS
ENROLLMENT
ENROLLMENT INFLUENCES
ENROLLMENT PROJECTIONS
ENROLLMENT TRENDS
EQUAL EDUCATION
ETHNIC GROUPS
EVALUATION CRITERIA
EVALUATION METHODS
EVENING PROGRAMS
EVENING STUDENTS
EXPENDITURES

FACULTY COLLEGE RELATIONSHIP
FACULTY DEVELOPMENT
FACULTY EVALUATION
FACULTY WORKLOAD
FEDERAL AID
FINANCIAL PROBLEMS
FINANCIAL SUPPORT
FOLLOWUP STUDIES
FULL TIME EQUIVALENCY
FULL TIME FACULTY
FULL TIME STUDENTS

GENERAL EDUCATION
GOVERNANCE
GOVERNING BOARD
GRADE POINT AVERAGE
GRADES (SCHOLASTIC)
GRADUATE SURVEYS

HEALTH OCCUPATIONS EDUCATION
HIGH RISK STUDENTS
HIGHER EDUCATIONS
HONORS CURRICULUM
HUMAN RESOURCE DEVELOPMENT
HUMANISTIC EDUCATION
HUMANITIES INSTRUCTION

INDIVIDUALIZED INSTRUCTION
INSERVICE TEACHER EDUCATION
INSTITUTIONAL RESEARCH
INSTRUCTIONAL INNOVATION
INTEGRATED CURRICULUM
INTERCOLLEGIATE COOPERATION
INTERDISCIPLINARY APPROACH

LEARNING RESOURCES CENTERS
LEARNING LABORATORIES
LIBERAL ARTS
LIFELONG LEARNING
LITERACY EDUCATION
LONG RANGE PLANNING
LONGITUDINAL STUDIES

MAJORS (STUDENTS)
MANAGEMENT BY OBJECTIVES
MASTER PLANS
MEASURES (INDIVIDUALS)
METHODS
MINORITY GROUPS
MISSION STATEMENTS
MULTICAMPUS COLLEGES
MULTICAMPUS DISTRICTS

NATIONAL SURVEYS
NEEDS ASSESSMENT
NONCREDIT COURSES

JC

JUNIOR COLLEGES
APPLICABLE TERMS

NONTRADITIONAL OCCUPATIONS
NONTRADITIONAL STUDENTS

OCCUPATIONAL EDUCATION
OLDER ADULTS
OPEN ENROLLMENT
ORGANIZATIONAL DEVELOPMENT
ORGANIZATIONAL OBJECTIVES
OUTCOMES OF EDUCATION

PART TIME STUDENTS
PART TIME FACULTY
POSTSECONDARY EDUCATION
PRIVATE COLLEGES
PROGRAM COSTS
PROGRAM DESCRIPTIONS
PROGRAM DEVELOPMENT
PROGRAM EFFECTIVENESS
PROGRAM IMPLEMENTATION
PROGRAMED INSTRUCTION

REENTRY STUDENTS
REMEDIAL EDUCATION
REMEDIAL PROGRAMS
RESEARCH METHODOLOGY
RETRAINING
ROLE OF EDUCATION
RURAL SCHOOLS

SCHOOL DISTRICTS
SCHOOL BUSINESS RELATIONSHIP
SCHOOL HOLDING POWER
SCHOOL COMMUNITY RELATIONSHIP
SCHOOL SURVEYS
SELF EVALUATION (GROUPS)
STATE AID
STATE COLLEGES
STAFF DEVELOPMENT
STATE LEGISLATION
STATE SURVEYS
STATEWIDE PLANNING
STUDENT ATTITUDES
STUDENT ATTRITION
STUDENT COLLEGE RELATIONSHIP
STUDENT COSTS
STUDENT EDUCATIONAL OBJECTIVES
STUDENT EVALUATION
STUDENT EVALUATION OF TEACHER PERFORMANCE
STUDENT NEEDS
STUDENT PERSONNEL SERVICES
STUDENT RECRUITMENT
STUDENT TEACHING RELATIONSHIP

TEACHER ATTITUDES
TEACHER CHARACTERISTICS
TEACHER EVALUATION
TEACHER PARTICIPATION
TEACHER SALARIES
TECHNICAL EDUCATION
TECHNICAL INSTITUTES
TEACHING METHODS
TECHNOLOGICAL LITERACY
TERMINAL STUDENTS
TRADE AND INDUSTRIAL EDUCATION
TRANSFER POLICY
TRANSFER PROGRAMS
TRANSFER STUDENTS
TREND ANALYSIS
TRUSTEES
TUITION
TUTORIAL PROGRAMS
TWO YEAR COLLEGES
TWO YEAR COLLEGE STUDENTS

UNDERGRADUATE STUDIES
UNIVERSITIES
URBAN SCHOOLS

VOCATIONAL EDUCATION
VOCATIONAL FOLLOWUP

WHITE STUDENTS
WITHDRAWAL (EDUCATION)
WRITING ACROSS THE CURRICULUM

885

ELEMENTARY AND EARLY CHILDHOOD EDUCATION (PS)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

All aspects of the growth, development, care, and education of children, from birth through six years. Materials on the development and education of children through early adolescence, excluding those areas covered by other Clearinghouses, may also be considered in scope. Specific populations of interest include: infants, preschool children; kindergartners; elementary school students; early adolescents; early childhood and elementary administrators/teachers/caregivers.

Specific subjects of interest are:

(1) Prenatal and infant development and care;

(2) Child care and community services for children at local, state, and federal levels, including family day care, before- and after-school day care, employer-supported day care, foster care and adoption;

(3) Elementary education, including screening and grade retention, and other non-subject-specific elementary areas not covered by other Clearinghouses;

(4) Parent, child, and family relationships and family life, including socialization, emotional development, and home and school social relationships;

(5) Parenting and parent education;

(6) Head Start, Follow-Through, Montessori, and other early childhood programs;

(7) Emergent literacy, family literacy, language acquisition and development in preschoolers and young children;

(8) Preparation of early childhood teachers and training of child caregivers;

(9) Learning theory and cognition theory, both research and concomitant practice that is related to children;

(10) Technology and children, including the effects of television, computers, videos, and other technology or media on children and families;

(11) Theoretical, philosophical, and policy issues related to children's development and education, including child advocacy and the effects of public policy on children.

II. EXPLANATORY NOTES

Documents dealing with migrant children over the age of six are transferred to RC. Documents on child abuse or special needs infants are transferred to EC. Documents dealing with bilingual education or second language learning are transferred to FL. Documents dealing primarily with emergent literacy (in children 0-6) are within the scope of PS; documents dealing with older children's literacy are transferred to CS. Parent education documents, that focus on adult education, are transferred to CE.

III. BRIEF STATEMENT

All aspects of the physical, cognitive, social, emotional, educational, and cultural development of children, from birth through early adolescence. Among the topics covered are: prenatal and infant development and care; parent education; home and school relationships; learning theory research and practice related to children's development; preparation of early childhood teachers and caregivers; and educational programs and community services for children.

ELEMENTARY AND EARLY CHILDHOOD EDUCATION

APPLICABLE TERMS

PS

ACADEMIC ACHIEVEMENT
ACHIEVEMENT NEED
ADJUSTMENT (TO ENVIRONMENT)
ADMINISTRATOR ATTITUDES
ADOPTED CHILDREN
ADOPTION
AFFECTIVE BEHAVIOR
AGE DIFFERENCES
ANXIETY
ATTACHMENT BEHAVIOR
ATTENTION
AUDITORY DISCRIMINATION
AUDITORY PERCEPTION

BASIC SKILLS
BEHAVIOR CHANGE
BEHAVIOR DEVELOPMENT
BEHAVIOR MODIFICATION
BEHAVIOR PATTERNS
BEHAVIORAL OBJECTIVES
BEHAVIORAL SCIENCE RESEARCH
BILINGUAL EDUCATION
BIRTH
BIRTH WEIGHT
BLACK YOUTH
BREASTFEEDING

CHILD ADVOCACY
CHILD CAREGIVERS
CHILD DEVELOPMENT
CHILD DEVELOPMENT CENTERS
CHILD PSYCHOLOGY
CHILD REARING
CHILD WELFARE
CHILDHOOD ATTITUDES
CHILDHOOD NEEDS
CHILDREN
CHILDRENS ART
CHILDRENS GAMES
CHILDRENS LITERATURE
CHILDRENS TELEVISION
CLASS ACTIVITIES
CLASSROOM COMMUNICATION
CLASSROOM ENVIRONMENT
CLASSROOM OBSERVATION TECHNIQUES
CLASSROOM RESEARCH
CLASSROOM TECHNIQUES
COGNITIVE DEVELOPMENT
COGNITIVE PROCESSES
COGNITIVE STYLE
COMMUNICATION SKILLS
COMMUNITY COOPERATION
COMMUNITY INVOLVEMENT
COMMUNITY RESOURCES
COMMUNITY SERVICES
COMPENSATION (CONCEPT)
COMPENSATORY EDUCATION
CONCEPT FORMATION
CONCEPTUAL TEMPO
CONSERVATION (CONCEPT)
CREATIVITY

CULTURAL INFLUENCES
CURRICULUM DESIGN
CURRICULUM DEVELOPMENT
CURRICULUM GUIDES

DAY CARE
DAY CARE CENTERS
DEMOGRAPHY
DIAGNOSTIC TESTS
DISADVANTAGED
DISADVANTAGED YOUTH
DISCIPLINE
DISCOVERY LEARNING
DIVORCE
DRAMATIC PLAY

EARLY ADOLESCENTS
EARLY CHILDHOOD EDUCATION
EARLY EXPERIENCE
EARLY READING
EDUCATIONAL CHANGE
EDUCATIONAL INNOVATION
EDUCATIONAL PHILOSOPHY
EDUCATIONAL POLICY
EDUCATIONAL PSYCHOLOGY
EDUCATIONAL TELEVISION
EDUCATIONAL THEORIES
ELEMENTARY EDUCATION
ELEMENTARY SCHOOL STUDENTS
EMERGENT LITERACY
EMOTIONAL DEVELOPMENT
EMOTIONAL EXPERIENCE
EMPLOYED PARENTS
EMPLOYER SUPPORTED DAY CARE
ENVIRONMENTAL INFLUENCES
ETHNIC GROUPS
EVALUATION
EVALUATION CRITERIA

FAMILY (SOCIOLOGICAL UNIT)
FAMILY CHARACTERISTICS
FAMILY DAY CARE
FAMILY ENVIRONMENT
FAMILY INFLUENCE
FAMILY LIFE
FAMILY PROBLEMS
FAMILY PROGRAMS
FATHERS
FEDERAL AID
FEDERAL LEGISLATION
FEDERAL PROGRAMS
FINANCIAL NEEDS
FINANCIAL SUPPORT
FOSTER CARE
FOSTER CHILDREN
FOSTER FAMILY

GRADE RETENTION
GROUP DYNAMICS

HEALTH PROGRAMS
HEALTH SERVICES
HIGH RISK PERSONS
HIGH RISK STUDENTS
HOME PROGRAMS
HOME SCHOOLING
HOME VISITS
HOMEWORK

IDENTIFICATION (PSYCHOLOGY)
INDIVIDUAL CHARACTERISTICS
INDIVIDUAL DIFFERENCES
INDIVIDUALIZED CURRICULUM
INDIVIDUALIZED INSTRUCTION
INDIVIDUALIZED PROGRAMS
INFANT BEHAVIOR
INFANTS
INNER CITY
INSERVICE TEACHER EDUCATION
INSTRUCTIONAL MATERIALS
INTELLECTUAL DEVELOPMENT
INTERMEDIATE GRADES
INTERPERSONAL COMPETENCE
INTERPERSONAL RELATIONSHIP
INTERVENTION

KINDERGARTEN
KINDERGARTEN CHILDREN

LANGUAGE ACQUISITION
LATCHKEY CHILDREN
LEARNING ACTIVITIES
LEARNING PROCESSES
LEARNING READINESS
LOCUS OF CONTROL
LOGICAL THINKING
LONGITUDINAL STUDIES

MAINSTREAMING
MATERNAL HEALTH
MATHEMATICS EDUCATION (NOTE: PRESCHOOL)
MATHEMATICS SKILLS (NOTE: PRESCHOOL)
MEMORY
MINORITY GROUP CHILDREN
MINORITY GROUPS
MIXED AGE GROUPS
MODELING (PSYCHOLOGY)
MORAL DEVELOPMENT
MOTHERS
MOVEMENT EDUCATION
MUSIC ACTIVITIES

NEONATES
NONPROFESSIONAL PERSONNEL
NUMBER CONCEPTS
NURSERY SCHOOLS
NUTRITION

ONE PARENT FAMILY
OPEN EDUCATION

ELEMENTARY AND EARLY CHILDHOOD EDUCATION

APPLICABLE TERMS

OPEN PLAN SCHOOLS
OPERANT CONDITIONING
OUTCOMES OF EDUCATION

PARAPROFESSIONAL SCHOOL PERSONNEL
PARENT AS A TEACHER
PARENT ATTITUDES
PARENT CHILD RELATIONSHIP
PARENT EDUCATION
PARENT INFLUENCE
PARENT MATERIALS
PARENT PARTICIPATION
PARENT RESOURCES
PARENT RESPONSIBILITY
PARENT ROLE
PARENT SCHOOL COOPERATION
PARENT SCHOOL RELATIONSHIP
PARENT TEACHER CONFERENCES
PARENT TEACHER COOPERATION
PARENTHOOD EDUCATION
PARENTING SKILLS
PARENTS
PEER ACCEPTANCE
PEER GROUPS
PEER TEACHING
PERCEPTION
PERCEPTUAL MOTOR COORDINATION
PERINATAL INFLUENCES
PERSONALITY DEVELOPMENT
PHYSICAL DEVELOPMENT
PHYSICAL EDUCATION
PIAGETIAN THEORY
PICTORIAL STIMULI
PLAY
POSITIVE REINFORCEMENT
PREGNANCY
PRENATAL INFLUENCES
PREREADING EXPERIENCE
PRESCHOOL CHILDREN
PRESCHOOL CURRICULUM
PRESCHOOL EDUCATION
PRESCHOOL EVALUATION
PRESCHOOL TEACHERS
PRESCHOOL TESTS
PRETEND PLAY
PRIMARY EDUCATION
PROGRAM CONTENT
PROGRAM DESCRIPTIONS
PROGRAM DESIGN
PROGRAM DEVELOPMENT
PROGRAM EFFECTIVENESS
PROGRAM EVALUATION
PROGRAM IMPLEMENTATION
PROJECT FOLLOW THROUGH
PROJECT HEAD START
PSYCHOMOTOR SKILLS
PUBLIC POLICY
PUBLIC SCHOOLS

RACIAL ATTITUDES
RACIAL DIFFERENCES
READINESS
READING ABILITY
READING ACHIEVEMENT
RECALL (PSYCHOLOGY)
REGULAR CLASS PLACEMENT
REMEDIAL PROGRAMS
REPORT CARDS
ROLE PLAYING

SAFETY
SCHOOL AGE DAY CARE
SCHOOL COMMUNITY RELATIONSHIP
SCHOOL ENTRANCE AGE
SCHOOL READINESS
SCHOOL ROLE
SCIENCE EDUCATION (NOTE: PRESCHOOL)
SCREENING TESTS
SELF CONCEPT
SEX DIFFERENCES
SEX ROLE
SIBLINGS
SKILL DEVELOPMENT
SOCIAL BEHAVIOR
SOCIAL DEVELOPMENT
SOCIAL INFLUENCES
SOCIAL REINFORCEMENT
SOCIAL STUDIES (NOTE: PRESCHOOL)
SOCIALIZATION
SOCIOECONOMIC INFLUENCES
SOCIOECONOMIC STATUS
SPATIAL ABILITY
SPECIAL HEALTH PROBLEMS
STAFF IMPROVEMENT
STANDARDS
STATE AID
STATE FEDERAL AID
STATE LEGISLATION
STATE PROGRAMS
STATE STANDARDS
STIMULATION
STRANGER REACTIONS
STRESS VARIABLES
STUDENT ATTITUDES
STUDENT BEHAVIOR
STUDENT MOTIVATION
SUMMER PROGRAMS

TEACHER AIDES
TEACHER ATTITUDES
TEACHER INFLUENCE
TEACHER ROLE
TEACHER STUDENT RELATIONSHIP
TEACHING GUIDES
TEACHING METHODS
TEAM TEACHING
TELEVISION VIEWING
TEST RESULTS
TESTS
TEST USE
TEST VALIDITY
TODDLERS
TOYS
TUTORING

UNWED MOTHERS

VERBAL ABILITY
VERBAL COMMUNICATION
VERBAL DEVELOPMENT
VISUAL DISCRIMINATION
VISUAL PERCEPTION
VISUALIZATION
VOLUNTEERS

YOUNG CHILDREN

RURAL EDUCATION AND SMALL SCHOOLS (RC)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

The **Scope of Interest Statement** for RC is subdivided into six parts, corresponding to their major areas of coverage as follows:

Rural Education
Schools and school districts in nonmetropolitan areas, small towns, remote areas, sparsely populated areas, or any combination thereof. Curriculum and instructional programs, methods, and materials that address the education of students attending schools in rural sections of the nation. Research and evaluation about educational practices and policies in rural schools, including curriculum and instruction, organizational effectiveness, student achievement and aspirations, and educational attainment. Social and economic conditions *that directly affect* the operation of rural schools, including rural and urban differences, migration patterns, rural economic development, training for employment, funding, taxation, and provisions for educational finance in rural schools and districts. The context of rural culture and cultural norms *as they relate* to the goals of rural education, educational practice, and students' aspirations and educational experience. Preparation programs, including related services, that train professionals to work in rural schools and districts. Also includes comparative education as it applies to the rural experience in other nations.

Small Schools
Educational practices and policies that apply to small schools whether urban, suburban, or rural. Research and evaluation concerning the influence of small school or district size on instructional practice, organizational effectiveness, and students' educational experience, aspirations, achievement, and attainment. Community, economic, social, and related influences, as they affect the operation of small schools or districts.

Education of American Indians and Alaska Natives
Both North and South American Indians, notably including Alaskan natives and Canadian natives, living in rural, suburban, and urban settings. Curriculum and instructional programs, methods, and materials that address the education of all American Indian groups. Includes curriculum and instructional materials pertaining to the various American Indian cultures and language groups. Research and evaluation about educational practices and policies in schools that serve these groups, including curriculum and instruction, organizational effectiveness, staff development, student achievement, and educational attainment. Social and economic conditions that affect the operation of schools that serve these groups, including linguistic and cultural differences, migration patterns, economic and social conditions on reservations and in the society at large as they affect the education of American Indians, training for employment, and the finance of American Indian education. The context of both ethnic and mainstream culture and cultural norms as they relate to the goals of American Indian education, educational practice, and students' aspirations and educational experience. Preparation programs, including related services, that train professionals to work with American Indian students.

Education of Mexican Americans

American citizens of Mexican ancestry, Mexican immigrants, and undocumented persons of Mexican origin, whether living in rural, suburban, or urban settings. Curriculum and instructional programs, methods, and materials that address the education of Mexican Americans. Includes curriculum and instructional materials pertaining to the Hispanic culture, including bilingual materials and programs. Research and evaluation about educational practices and policies in schools that serve Mexican Americans, including curriculum and instruction, organizational effectiveness, staff development, student achievement, and educational attainment. Social and economic conditions that affect the operation of schools that serve Mexican Americans, including linguistic and cultural differences, migration patterns, acculturation, and social and economic conditions in the society at large and within subgroups of the Mexican-American population. The context of both ethnic and mainstream culture and cultural norms as they relate to the goals of education for Mexican Americans, educational practice, and students' aspirations and educational experience, including cultural, social, and economic antecedents in Mexico as they affect Mexican Americans. Preparation programs, including related services, that train professionals to work with Mexican American students.

Migrant Education

Students who currently move or have recently moved as a result of their own or their families' temporary or seasonal employment, often, but not always, in industries related to agricultural production or processing. Includes such students from all ethnic or national backgrounds, whether located in rural, suburban, or urban settings. Curriculum and instructional programs, methods, and materials designed to improve the education of migrant students. Research and evaluation about educational practices and policies intended to serve migrant students, including curriculum and instruction, organizational effectiveness, staff development, student achievement and aspirations, and educational attainment. Social and economic conditions that affect the education of migrant students, including migration patterns, the educational discontinuities imposed by frequent moves, the working and living conditions of migrant families, and linguistic and cultural differences among the migrant population and between the migrant population and the general population. Preparation programs, including related services, that train professionals to work with migrant students.

Outdoor Education

The use of features of the natural environment for instruction in schools or school programs, whether rural, suburban, or urban. Includes residential and day camps, adventure education, and curriculum and instructional methods for experiential learning generally. Models and philosophies of outdoor education and experiential learning. Research and evaluation about educational practices employing such models, philosophies, methods, and resources, or taking place in such programs. Applications of outdoor education to special populations, including at-risk students, exceptional students, and adult learners.

II. EXPLANATORY NOTES

Documents that deal exclusively with environmental education are transferred to SE. Documents that deal exclusively with physical education or recreation are transferred to SP. Documents that concern Blacks, Puerto Ricans, Asian Americans, or Cubans (wherever located) are transferred to UD. The chart that follows shows the allocation of the various ethnic groups between RC and UD.

ETHNIC GROUP	LOCATION	
	URBAN/ SUBURBAN	RURAL
Blacks	UD	UD
Puerto Ricans	UD	UD
Cubans	UD	UD
Asian Americans	UD	UD
Mexican Americans **(Spanish Americans, Chicanos, Hispanics, Mexicans)**	RC	RC
American Indians/Alaska Natives **(Native Americans, Eskimos, Aleuts, and Canada Natives)**	RC	RC
Migrants	RC	RC
All Others	UD	RC

III. BRIEF STATEMENT

Curriculum and instructional programs, methods, and materials that address the education of students in rural schools or districts, small schools wherever located, and schools or districts wherever located that serve American Indian and Alaskan natives, Mexican Americans, and migrants, or that have programs related to outdoor education. Research and evaluation about students, schools, and districts within such groups or served by such programs. Also includes cultural, ethnic, linguistic, economic, and social conditions that affect rural education, small schools, American Indians and Alaskan natives, Mexican Americans, migrants, and outdoor education. Preparation programs, including related services, that train professionals to work in such contexts.

RURAL EDUCATION AND SMALL SCHOOLS
APPLICABLE TERMS

RC

ACADEMIC ACHIEVEMENT
ACADEMIC ASPIRATION
ACADEMICALLY GIFTED
ACCESS TO EDUCATION
ACCIDENT PREVENTION
ACCULTURATION
ACHIEVEMENT GAINS
ADJUSTMENT (TO ENVIRONMENT)
ADMINISTRATIVE CHANGE
ADMINISTRATIVE ORGANIZATION
ADMINISTRATOR ATTITUDES
ADMINISTRATOR CHARACTERISTICS
ADMINISTRATOR EDUCATION
ADMINISTRATOR RESPONSIBILITY
ADMINISTRATOR ROLE
ADMINISTRATORS
ADMISSION CRITERIA
ADOLESCENTS
ADOPTION (IDEAS)
ADULT BASIC EDUCATION
ADULT FARMER EDUCATION
ADULT LITERACY
ADULTS
ADVENTURE EDUCATION
AGENCY COOPERATION
AGENCY ROLE
AGRICULTURAL EDUCATION
AGRICULTURAL LABORERS
AGRICULTURAL PRODUCTION
AGRICULTURAL TRENDS
AGRICULTURE
ALASKA NATIVES
ALCOHOL EDUCATION
ALCOHOLISM
AMERICAN INDIAN CULTURE
AMERICAN INDIAN EDUCATION
AMERICAN INDIAN HISTORY
AMERICAN INDIAN LANGUAGES
AMERICAN INDIAN LITERATURE
AMERICAN INDIAN RESERVATIONS
AMERICAN INDIAN STUDIES
AMERICAN INDIANS
ANGLO AMERICANS
ANIMALS
ARITHMETIC
ATTITUDE CHANGE
ATTITUDE MEASURES
ATTITUDES

BASIC SKILLS
BEGINNING TEACHERS
BEHAVIOR DISORDERS
BEHAVIORAL OBJECTIVES
BELIEFS
BILINGUAL EDUCATION
BILINGUAL STUDENTS
BILINGUALISM
BIOGRAPHIES
BLACKS
BOARD OF EDUCATION ROLE
BOARDING SCHOOLS
BOARDS OF EDUCATION
BURNOUT

CAMPING
CANADA NATIVES
CAPITAL
CAREER CHOICE
CAREER EDUCATION
CAREER GUIDANCE
CENSUS FIGURES
CHANGE STRATEGIES
CHILD ABUSE
CHILD DEVELOPMENT
CHILD NEGLECT
CHILD REARING
CHILD WELFARE
CHILDHOOD NEEDS
CHILDREN
CHILDRENS LITERATURE
CITIZEN PARTICIPATION
CITIZENSHIP
CLASS ACTIVITIES
CLASSROOM COMMUNICATION
CLASSROOM TECHNIQUES
COGNITIVE DEVELOPMENT
COGNITIVE PROCESSES
COGNITIVE STYLE
COLLEGE PREPARATION
COLLEGE ROLE
COLLEGE SCHOOL COOPERATION
COLLEGE STUDENTS
COMMUNICATION SKILLS
COMMUNICATION THOUGHT TRANSFER
COMMUNITY DEVELOPMENT
COMPARATIVE ANALYSIS
COMPARATIVE EDUCATION
COMPENSATORY EDUCATION
COMPLIANCE (LEGAL)
COMPUTER ASSISTED INSTRUCTION
COMPUTER LITERACY
COMPUTER ORIENTED PROGRAMS
COMPUTER USES IN EDUCATION
COMPUTERS
CONFLICT
CONSERVATION EDUCATION
CONSERVATION ENVIRONMENT
CONSOLIDATED SCHOOLS
CONTINUING EDUCATION
COOPERATION
COOPERATIVE PLANNING
COOPERATIVE PROGRAMS
COPING
CORRESPONDENCE STUDY
COST EFFECTIVENESS
COUNSELING TECHNIQUES
COURSE CONTENT
COURSE DESCRIPTIONS
COURT LITIGATION
CRIME
CROSS CULTURAL STUDIES
CROSS CULTURAL TRAINING
CULTURAL ACTIVITIES
CULTURAL AWARENESS
CULTURAL BACKGROUND
CULTURAL CONTEXT
CULTURAL DIFFERENCES
CULTURAL EDUCATION
CULTURAL IMAGES
CULTURAL INFLUENCES
CULTURAL PLURALISM
CULTURAL TRAITS
CULTURE CONFLICT
CURRICULUM DESIGN

DANCE
DAY CAMP PROGRAMS
DECENTRALIZATION
DECISION MAKING
DEFINITIONS
DELINQUENCY
DELIVERY SYSTEMS
DEMOGRAPHY
DEMONSTRATION PROGRAMS
DEVELOPING NATIONS
DEVELOPMENTAL DISABILITIES
DIFFERENCES
DIFFUSION COMMUNICATION
DISABILITIES
DISCIPLINE
DISTANCE EDUCATION
DRINKING
DROPOUT PREVENTION
DROPOUT PROGRAMS
DROPOUT RATE
DROPOUTS
DRUG ABUSE
DRUG EDUCATION

EARLY CHILDHOOD EDUCATION
ECOLOGY
ECONOMIC CHANGE
ECONOMIC CLIMATE
ECONOMIC DEVELOPMENT
ECONOMIC FACTORS
ECONOMIC STATUS
ECONOMICALLY DISADVANTAGED
EDUCATION WORK RELATIONSHIP
EDUCATIONAL ADMINISTRATION
EDUCATIONAL ASSESSMENT
EDUCATIONAL ATTAINMENT
EDUCATIONAL ATTITUDES
EDUCATIONAL CHANGE
EDUCATIONAL COOPERATION
EDUCATIONAL DEVELOPMENT
EDUCATIONAL DISCRIMINATION
EDUCATIONAL ENVIRONMENT
EDUCATIONAL EQUITY FINANCE
EDUCATIONAL FINANCE
EDUCATIONAL GAMES
EDUCATIONAL HISTORY

RC

RURAL EDUCATION AND SMALL SCHOOLS

APPLICABLE TERMS

EDUCATIONAL IMPROVEMENT
EDUCATIONAL INNOVATION
EDUCATIONAL LEGISLATION
EDUCATIONAL NEEDS
EDUCATIONAL OBJECTIVES
EDUCATIONAL OPPORTUNITIES

EDUCATIONAL PHILOSOPHY
EDUCATIONAL PLANNING
EDUCATIONAL POLICY
EDUCATIONAL PRACTICES
EDUCATIONAL QUALITY
EDUCATIONAL RESEARCH
EDUCATIONAL RESOURCES
EDUCATIONAL RESPONSIBILITY
EDUCATIONAL STRATEGIES
EDUCATIONAL TECHNOLOGY
EDUCATIONAL THEORIES
EDUCATIONAL TRENDS
EDUCATIONALLY DISADVANTAGED
ELEMENTARY EDUCATION
ELEMENTARY SCHOOL MATHEMATICS
ELEMENTARY SCHOOL SCIENCE
ELEMENTARY SCHOOL STUDENTS
ELEMENTARY SCHOOL TEACHERS
ELEMENTARY SECONDARY EDUCATION
EMOTIONAL DISTURBANCES
EMPLOYED WOMEN
EMPLOYMENT PATTERNS
ENGLISH SECOND LANGUAGE
ENRICHMENT ACTIVITIES
ENROLLMENT TRENDS
ENTREPRENEURSHIP
ENVIRONMENTAL INFLUENCES
EQUAL EDUCATION
ESKIMOS
ETHICAL INSTRUCTION
ETHNIC BIAS
ETHNIC GROUPS
ETHNIC RELATIONS
ETHNIC STEREOTYPES
ETHNICITY
ETHNOCENTRISM
ETHNOGRAPHY
EVALUATION
EXPECTATION
EXPERIENTIAL LEARNING
EXTENSION AGENTS
EXTENSION EDUCATION

FACULTY DEVELOPMENT
FAMILY CHARACTERISTICS
FAMILY ENVIRONMENT
FAMILY INFLUENCE
FAMILY LIFE
FAMILY PROBLEMS
FAMILY SCHOOL RELATIONSHIP
FARM LABOR
FARMERS
FEDERAL AID
FEDERAL GOVERNMENT
FEDERAL INDIAN RELATIONSHIP
FEDERAL LEGISLATION
FEDERAL PROGRAMS
FEDERAL REGULATION
FEMALES
FIELD EXPERIENCE PROGRAMS
FINANCIAL POLICY
FINANCIAL PROBLEMS
FINANCIAL SUPPORT
FOLK CULTURE
FOOD
FOREIGN COUNTRIES
FOREIGN STUDENTS
FUTURES OF SOCIETY

GAMES
GIFTED
GLOBAL APPROACH
GOVERNANCE
GOVERNMENT ROLE
GROUP ACTIVITIES
GROUP DYNAMICS
GUIDANCE

HANDICRAFTS
HEADS OF HOUSEHOLDS
HEALTH SERVICES
HIGH RISK STUDENTS
HIGH SCHOOL EQUIVALENCY PROGRAMS
HIGH SCHOOL STUDENTS
HIGH SCHOOLS
HIGHER EDUCATION
HISPANIC AMERICAN CULTURE
HISPANIC AMERICANS
HOLISTIC APPROACH
HOUSING
HUMAN RESOURCES
HUMAN SERVICES
HUMANITIES

IMMIGRANTS
IMPROVEMENT PROGRAMS
INCOME
INDIGENOUS POPULATIONS
INDIVIDUAL CHARACTERISTICS
INDIVIDUAL DEVELOPMENT
INDIVIDUALIZED EDUCATION PROGRAMS
INDIVIDUALIZED INSTRUCTION
INFANTS
INFLUENCES
INFORMATION DISSEMINATION
INFORMATION SOURCES
INSERVICE EDUCATION
INSERVICE TEACHER EDUCATION
INSTITUTIONAL CHARACTERISTICS
INSTRUCTIONAL MATERIALS
INTELLECTUAL DISCIPLINES
INTELLIGENCE TESTS
INTERACTION
INTERDISCIPLINARY APPROACH
INTERNATIONAL PROGRAMS
INTERNSHIP PROGRAMS
INTERPERSONAL COMMUNICATION
INTERVENTION

JOB SATISFACTION
JOB SKILLS
JOB TRAINING

LABOR ECONOMICS
LABOR FORCE DEVELOPMENT
LABOR MARKET
LAND SETTLEMENT
LAND USE
LANGUAGE ACQUISITION
LANGUAGE ARTS
LANGUAGE ATTITUDES
LANGUAGE EXPERIENCE APPROACH
LANGUAGE MAINTENANCE
LANGUAGE PROFICIENCY
LANGUAGE SKILLS
LANGUAGE USAGE
LATIN AMERICAN HISTORY
LEADERS
LEADERSHIP TRAINING
LEARNING DISABILITIES
LEGAL RESPONSIBILITY
LEGENDS
LIBRARY COLLECTIONS
LIFE SATISFACTION
LIFE STYLE
LIFELONG LEARNING
LIMITED ENGLISH SPEAKING
LINKING AGENTS
LITERACY EDUCATION
LITERATURE REVIEWS
LOCAL HISTORY
LOCAL ISSUES
LOCUS OF CONTROL
LONG RANGE PLANNING
LOW INCOME

MAINSTREAMING
MANAGEMENT DEVELOPMENT
MASS MEDIA
MATHEMATICS INSTRUCTION
MEASUREMENT
MEDICAL SERVICES
MENTAL HEALTH PROGRAMS
MEXICAN AMERICAN EDUCATION
MEXICAN AMERICAN HISTORY
MEXICAN AMERICANS
MEXICANS
MICROCOMPUTERS
MIGRANT ADULT EDUCATION
MIGRANT CHILDREN
MIGRANT EDUCATION

RURAL EDUCATION AND SMALL SCHOOLS

APPLICABLE TERMS

RC

MIGRANT HEALTH SERVICES
MIGRANT PROBLEMS
MIGRANT PROGRAMS
MIGRANT WORKERS
MIGRANT YOUTH
MIGRANTS
MIGRATION
MINORITY GROUP CHILDREN
MINORITY GROUPS
MODELS
MOTHERS
MULTICULTURAL EDUCATION

NATIVE LANGUAGE INSTRUCTION
NATURAL RESOURCES
NAVAJO
NEEDS ASSESSMENT
NETWORKS

NON ENGLISH SPEAKING
NONFORMAL EDUCATION
NONTRADITIONAL EDUCATION
NUTRITION

OCCUPATIONAL ASPIRATION
OLDER ADULTS
ONE TEACHER SCHOOLS
ORAL HISTORY
ORGANIZATIONAL CHANGE
ORGANIZATIONAL CLIMATE
ORGANIZATIONAL EFFECTIVENESS
ORGANIZATIONAL OBJECTIVES
ORGANIZATIONS GROUPS
OUTCOMES OF EDUCATION
OUTDOOR ACTIVITIES
OUTDOOR EDUCATION
OUTREACH PROGRAMS

PARENT ATTITUDES
PARENT CHILD RELATIONSHIP
PARENT EDUCATION
PARENT PARTICIPATION
PARENT ROLE
PARENT SCHOOL RELATIONSHIP
PARENT STUDENT RELATIONSHIP
PARENT TEACHER COOPERATION
PARTICIPANT SATISFACTION
PARTICIPATIVE DECISION MAKING
PERFORMANCE FACTORS
PERSONAL NARRATIVES
PESTICIDES
PHYSICIANS
PLACE OF RESIDENCE
PLANNING
PLANT IDENTIFICATION
POETRY
POLICY FORMATION
POLITICAL ATTITUDES
POLITICAL INFLUENCES
POLITICAL ISSUES
POLITICAL POWER
POLITICS OF EDUCATION
POPULATION DISTRIBUTION
POPULATION GROWTH
POPULATION TRENDS
POSTSECONDARY EDUCATION
POVERTY
POWER STRUCTURE
PREDICTOR VARIABLES
PRESCHOOL CHILDREN
PRESCHOOL EDUCATION
PRESERVICE TEACHER EDUCATION
PREVENTION
PRINCIPALS
PRIVATE SCHOOLS
PROBLEM SOLVING
PROBLEMS
PROFESSIONAL ASSOCIATIONS
PROFESSIONAL DEVELOPMENT
PROFESSIONAL EDUCATION
PROFESSIONAL RECOGNITION
PROFILES
PROGRAM ADMINISTRATION
PROGRAM ATTITUDES
PROGRAM CONTENT
PROGRAM DESCRIPTIONS
PROGRAM DESIGN
PROGRAM DEVELOPMENT
PROGRAM EFFECTIVENESS
PROGRAM EVALUATION
PROGRAM IMPLEMENTATION
PROGRAM IMPROVEMENT
PUBLIC EDUCATION
PUBLIC OPINION
PUBLIC POLICY
PUBLIC RELATIONS
PUBLIC SCHOOLS
PUERTO RICANS

RACIAL DIFFERENCES
RECREATIONAL ACTIVITIES
RECRUITMENT
REFERENCE MATERIALS
REGIONAL CHARACTERISTICS
REGIONAL PROGRAMS
RELEVANCE EDUCATION
RELOCATION
RESEARCH PROBLEMS
RESERVATION AMERICAN INDIANS
RESIDENT CAMP PROGRAMS
RESIDENTIAL PATTERNS
RESOURCE ALLOCATION
RESOURCE MATERIALS
RETRENCHMENT
ROLE CONFLICT
ROLE MODELS
ROLE PERCEPTION
ROLE OF EDUCATION
RURAL AREAS
RURAL DEVELOPMENT
RURAL ECONOMICS
RURAL EDUCATION
RURAL ENVIRONMENT
RURAL EXTENSION
RURAL FAMILY
RURAL FARM RESIDENTS
RURAL POPULATION
RURAL SCHOOLS
RURAL URBAN DIFFERENCES
RURAL YOUTH
RURAL TO URBAN MIGRATION

SAFETY EDUCATION
SCHOOL ADMINISTRATION
SCHOOL ATTITUDES
SCHOOL BUSINESS RELATIONSHIP
SCHOOL CLOSING
SCHOOL COMMUNITY RELATIONSHIP
SCHOOL COUNSELORS
SCHOOL DEMOGRAPHY
SCHOOL DISTRICT REORGANIZATION
SCHOOL DISTRICT SIZE
SCHOOL DISTRICTS
SCHOOL EFFECTIVENESS
SCHOOL HOLDING POWER
SCHOOL ORGANIZATION
SCHOOL PSYCHOLOGISTS
SCHOOL ROLE
SCHOOL SIZE
SCHOOL STATISTICS
SCIENCE ACTIVITIES
SCIENCE EDUCATION
SCIENCE INSTRUCTION
SECOND LANGUAGE INSTRUCTION
SECOND LANGUAGE LEARNING
SECONDARY EDUCATION
SECONDARY SCHOOL CURRICULUM
SECONDARY SCHOOL STUDENTS
SECONDARY SCHOOLS
SELF ACTUALIZATION
SELF CONCEPT
SELF DETERMINATION
SELF ESTEEM
SELF EVALUATION INDIVIDUALS
SELF HELP PROGRAMS
SEX BIAS
SEX DIFFERENCES
SEX ROLE
SHARED RESOURCES AND SERVICES
SHARED SERVICES
SKILL DEVELOPMENT
SMALL BUSINESSES
SMALL SCHOOLS
SOCIAL ATTITUDES
SOCIAL BIAS
SOCIAL CHANGE
SOCIAL HISTORY

SOCIAL INFLUENCES
SOCIAL INTEGRATION
SOCIAL PROBLEMS
SOCIAL SCIENCE RESEARCH
SOCIAL SERVICES
SOCIAL STUDIES
SOCIAL SUPPORT GROUPS
SOCIAL THEORIES
SOCIAL VALUES
SOCIAL WORK
SOCIOCULTURAL PATTERNS
SOCIOECONOMIC BACKGROUND
SOCIOECONOMIC INFLUENCES
SOCIOECONOMIC STATUS
SPANISH SPEAKING
SPECIAL EDUCATION
STAFF DEVELOPMENT
STAFF ROLE
STANDARDS
STATE GOVERNMENT
STATE LEGISLATION
STATE PROGRAMS
STATE SCHOOL DISTRICT RELATIONSHIP
STORY TELLING
STRESS MANAGEMENT
STRESS VARIABLES
STUDENT ATTITUDES
STUDENT BEHAVIOR
STUDENT CHARACTERISTICS
STUDENT DEVELOPMENT
STUDENT EDUCATIONAL OBJECTIVES
STUDENT EVALUATION
STUDENT FINANCIAL AID
STUDENT MOTIVATION
STUDENT NEEDS
STUDENT PARTICIPATION
STUDENT PLACEMENT
STUDENT PROJECTS
STUDENT RECORDS
STUDENT RECRUITMENT
STUDENT RESPONSIBILITY
STUDENT SCHOOL RELATIONSHIP
STUDENT TEACHER RELATIONSHIP
STUDENT TEACHERS
STUDENT TEACHING
STUDY SKILLS
SUCCESS
SUMMER PROGRAMS
SUPERINTENDENTS
SUPERVISORY METHODS
SUPPLEMENTARY READING MATERIALS

TALENT IDENTIFICATION
TEACHER ATTITUDES
TEACHER BEHAVIOR
TEACHER CERTIFICATION
TEACHER CHARACTERISTICS
TEACHER EDUCATION
TEACHER EFFECTIVENESS
TEACHER EVALUATION
TEACHER IMPROVEMENT
TEACHER INFLUENCE
TEACHER ORIENTATION
TEACHER PARTICIPATION
TEACHER RECRUITMENT
TEACHER RESPONSE
TEACHER RESPONSIBILITY
TEACHER ROLE
TEACHER STUDENT RELATIONSHIP
TEACHERS
TEACHING CONDITIONS
TEACHING METHODS
TEACHING OCCUPATION
TEACHING SKILLS
TEACHING STYLES
TECHNICAL ASSISTANCE
TECHNOLOGICAL ADVANCEMENT
TELECOMMUNICATIONS
TELECONFERENCING
TEST BIAS
TEST INTERPRETATION
TEST VALIDITY
TRAINING METHODS
TREATIES
TREND ANALYSIS
TRIBAL SOVEREIGNTY
TRIBES
TUTORIAL PROGRAMS

UNDOCUMENTED IMMIGRANTS
UNEMPLOYMENT
UNITED STATES HISTORY
UNITS OF STUDY
UNIVERSITIES
URBAN AMERICAN INDIANS
URBAN TO RURAL MIGRATION

VOCATIONAL EDUCATION
VOLUNTEERS

WELFARE SERVICES
WELL BEING
WHITES
WILDLIFE
WOMENS EDUCATION
WORK ATTITUDES
WORK ENVIRONMENT
WORK EXPERIENCE PROGRAMS
WORKSHOPS
WRITING INSTRUCTION
WRITING SKILLS

YOUNG ADULTS
YOUTH

SCIENCE, MATHEMATICS, AND ENVIRONMENTAL EDUCATION (SE)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

All levels and aspects of science, mathematics, engineering/technology, and environmental education, including Teacher Education in these areas. The following topics are included, *when focused on any of the broad scope areas referred to above*:

(1) Applications of learning theory and consideration of learning outcomes, including the impact of attitudes, skills, intelligence, values, and concept development upon learning;

(2) Instructional materials, curriculum guides, and teaching guides;

(3) Educational programs, projects, and special activities;

(4) Research and evaluative studies;

(5) Applications of educational technology and media, including computer software.

II. EXPLANATORY NOTES

While SE covers environmental education activities in general, some aspects of environmental education are within the scopes of other Clearinghouses. For example, general outdoor education materials are within the scope of RC. Social aspects of environmental education are covered by SO. SE works with various associations and groups having science, mathematics, engineering/technology, and environmental interests in postsecondary and higher education and generally includes the publications of these organizations within its scope. These publications generally concern professional and technical courses, programs, and occupations. In the "technology" area, *"Educational Technology"* is within IR's scope and *"Technology Education"* (formerly *"Industrial Arts"*) is within CE's scope.

III. BRIEF STATEMENT

Science, mathematics, engineering/technology, and environmental education at all levels. The following topics when focused on any of the above broad scope areas: applications of learning theory; curriculum and instructional materials; teachers and teacher education; educational programs and projects; research and evaluative studies; applications of educational technology and media.

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SCIENCE, MATHEMATICS, AND ENVIRONMENTAL EDUCATION

APPLICABLE TERMS

SE

ACADEMIC ACHIEVEMENT
ACCELERATION (PHYSICS)
ACHIEVEMENT TESTS
ACID RAIN
ACOUSTICS
ACTIVITY UNITS
ADDITION
ADHESIVES
ADULT EDUCATION
ADULT STUDENTS
ADVANCED PLACEMENT
ADVANCED PLACEMENT PROGRAM
AEROSPACE EDUCATION
AEROSPACE TECHNOLOGY
AGRICULTURAL EDUCATION
AGRICULTURAL ENGINEERING
AGRICULTURAL SAFETY
AGRICULTURE
AGRONOMY
AIR POLLUTION
ALGEBRA
ALGORITHMS
ALTERNATIVE ENERGY SOURCES
ANALYTIC GEOMETRY
ANATOMY
ANIMAL BEHAVIOR
ANIMAL FACILITIES
ANIMAL HUSBANDRY
ANIMALS
ARITHMETIC
ARTIFICIAL INTELLIGENCE
ASBESTOS
ASTRONOMY
ATOMIC STRUCTURE
ATOMIC THEORY
AVIATION EDUCATION
AVIATION MECHANICS
AVIATION TECHNOLOGY

BASIC SKILLS (MATHEMATICS)
BIOCHEMISTRY
BIOETHICS
BIOFEEDBACK
BIOLOGICAL INFLUENCES
BIOLOGICAL SCIENCES
BIOLOGY
BIOMECHANICS
BIOMEDICINE
BIONICS
BIOPHYSICS
BOTANY
BUSINESS MATHEMATICS

CALCULATORS
CALCULUS
CALORIMETERS
CANCER
CARDIOVASCULAR SYSTEM
CHEMICAL ANALYSIS
CHEMICAL BONDING
CHEMICAL ENGINEERING
CHEMICAL EQUILIBRIUM
CHEMICAL NOMENCLATURE
CHEMICAL REACTIONS
CHEMICAL STUDIES
CHEMICAL TECHNICIANS
CHEMISTRY
CHROMATOGRAPHY
CIVIL ENGINEERING
CLASSIFICATION
CLASSIFICATION (SCIENCE)
COAL
COLLEGE MATHEMATICS
COLLEGE SCIENCE
COMPUTER ASSISTED INSTRUCTION
COMPUTER GRAPHICS
COMPUTER MANAGED INSTRUCTION
COMPUTER NETWORKS
COMPUTER SCIENCE
COMPUTER SCIENCE EDUCATION
COMPUTER SIMULATION
COMPUTER SOFTWARE REVIEWS
COMPUTER TECHNOLOGY
COMPUTER USES IN EDUCATION
COMPUTERS
CONCEPT FORMATION
CONGRUENCE (MATHEMATICS)
CONSERVATION (CONCEPT)
CONSERVATION (ENVIRONMENT)
CONSERVATION EDUCATION
CONSUMER MATHEMATICS
COURSE CONTENT
COURSE EVALUATION
CRYSTALLOGRAPHY
CURRICULUM DESIGN
CURRICULUM DEVELOPMENT
CURRICULUM EVALUATION
CURRICULUM GUIDES
CYBERNETICS
CYTOLOGY

DECIMAL FRACTIONS
DIFFUSION (PHYSICS)
DISCOVERY LEARNING
DISEASE CONTROL
DNA
DRINKING WATER

EARTH SCIENCES
EARTHQUAKES
ECOLOGICAL FACTORS
ECOLOGY
EDUCATIONAL CHANGE
EDUCATIONAL FACILITIES
EDUCATIONAL IMPROVEMENT
ELECTRIC BATTERIES
ELECTRIC CIRCUITS
ELECTRIC MOTORS
ELECTRICAL ENGINEERING
ELECTRICAL SYSTEMS
ELECTRICITY
ELECTROENCEPHALOGRAPHY
ELECTROMECHANICAL AIDS
ELECTROMECHANICAL TECHNOLOGY
ELECTRONIC CLASSROOMS
ELECTRONIC EQUIPMENT
ELECTRONIC INDUSTRY
ELECTRONICS
ELEMENTARY EDUCATION
ELEMENTARY SCHOOL MATHEMATICS
ELEMENTARY SCHOOL SCIENCE
EMBRYOLOGY
ENERGY
ENERGY CONSERVATION
ENERGY EDUCATION
ENERGY MANAGEMENT
ENERGY OCCUPATIONS
ENGINEERING (GENERAL)
ENGINEERING DRAWING
ENGINEERING EDUCATION
ENGINEERING GRAPHICS
ENGINEERING TECHNICIANS
ENGINEERING TECHNOLOGY
ENGINEERS
ENGINES
ENTOMOLOGY
ENTROPY
ENVIRONMENT
ENVIRONMENTAL EDUCATION
ENVIRONMENTAL INFLUENCES
ENVIRONMENTAL RESEARCH
ENVIRONMENTAL STANDARDS
ENVIRONMENTAL TECHNICIANS
ENZYMES
EPIDEMIOLOGY
EQUATIONS (MATHEMATICS)
EQUIPMENT
EQUIPMENT STORAGE
ESTIMATION (MATHEMATICS)
ESTUARIES
EVOLUTION
EXHIBITS
EXPERIMENTAL LEARNING
EXPERIMENTS
EXPERT SYSTEMS
EXTENSION AGENTS
EXTRACURRICULAR ACTIVITIES

FACILITIES
FEDERAL AID
FEDERAL LEGISLATION
FEDERAL PROGRAMS
FIELD INSTRUCTION
FIELD STUDIES
FIELD TRIPS
FIRE SCIENCE EVALUATION
FLUID MECHANICS
FLUORIDATION
FORCE
FORESTRY
FRACTIONS

SCIENCE, MATHEMATICS, AND ENVIRONMENTAL EDUCATION

APPLICABLE TERMS

FUEL CONSUMPTION
FUELS
FUNCTIONS (MATHEMATICS)
FUTURES (OF SOCIETY)

GENERAL SCIENCE
GENETIC ENGINEERING
GENETICS
GEOLOGY
GEOMETRIC CONCEPTS
GEOMETRIC CONSTRUCTION
GEOMETRY
GEOPHYSICS
GLOBAL EDUCATION
GLOBAL WARMING
GRADUATE STUDENTS
GRADUATE STUDY
GRAVITY (PHYSICS)
GREENHOUSE EFFECT

HANDS-ON ACTIVITIES
HAZARDOUS MATERIALS
HAZARDOUS WASTES
HEAT
HERBICIDES
HEREDITY
HIGH SCHOOL COLLEGE COOPERATION
HIGHER EDUCATION
HOLOGRAPHY
HONORS CURRICULUM
HORTICULTURE
HUMAN BIOLOGY
HUMAN BODY
HUMIDITY

ICHTHYOLOGY
INDEPENDENT STUDY
INDUCTION
INEQUALITY (MATHEMATICS)
INFORMAL EDUCATION
INORGANIC CHEMISTRY
INSECTICIDES
INSERVICE TEACHER EDUCATION
INSTRUCTIONAL MATERIALS
INSTRUMENTATION
INTEGERS
INTEGRATED ACTIVITIES
INTEGRATED CURRICULUM
INTERACTIVE VIDEO
INTERDISCIPLINARY APPROACH
INTERNATIONAL EDUCATIONAL EXCHANGE
INVENTION
INVENTORS
INVESTIGATIONS

KINETIC MOLECULAR THEORY
KINETICS LABORATORIES

LABORATORY ANIMALS
LABORATORY EQUIPMENT
LABORATORY EXPERIMENTS
LABORATORY INTERFACING
LABORATORY MANUALS
LABORATORY PROCEDURES
LABORATORY SAFETY
LABORATORY TECHNIQUES
LABORATORY TECHNOLOGY
LABORATORY TRAINING
LAND USE
LASERS
LEAD POISONING
LEARNING
LIFE SCIENCES
LIGHT
LITTER
LOGIC
LOGICAL THINKING
LOW ABILITY STUDENTS
LUMBER INDUSTRY
LUMINESCENCE
LUNAR RESEARCH

MAGNETS
MAGNIFICATION METHODS
MANIPULATIVE MATERIALS
MARINE BIOLOGY
MARINE EDUCATION
MASTERS DEGREES
MASTERY LEARNING
MASTERY TESTS
MATHEMATIC ACHIEVEMENT
MATHEMATIC INSTRUCTION
MATHEMATIC SKILLS
MATHEMATICAL APPLICATIONS
MATHEMATICAL CONCEPTS
MATHEMATICAL ENRICHMENT
MATHEMATICAL FORMULAS
MATHEMATICAL LINGUISTICS
MATHEMATICAL LOGIC
MATHEMATICAL MODELS
MATHEMATICAL VOCABULARY
MATHEMATICIANS
MATHEMATICS
MATHEMATICS ANXIETY
MATHEMATICS CURRICULUM
MATHEMATICS EDUCATION
MATHEMATICS FORMULAS
MATHEMATICS LINGUISTICS
MATHEMATICS MATERIALS
MATHEMATICS TEACHERS
MATHEMATICS TESTS
MATTER
MEASUREMENT (MATHEMATICS)
MEASUREMENT (SCIENCE)
MEASUREMENT TECHNIQUES
MECHANICAL ENGINEERING
MECHANICS (PHYSICS)
METABOLISM
METACOGNITION
METALLURGY
METALS
METEOROLOGY
METRIC SYSTEM
MICROBIOLOGY
MICROCOMPUTER BASED LABORATORIES
MICROSCOPES
MINERALOGY
MINERALS
MINING
MISCONCEPTIONS (SCIENCE)
MOBILE LABORATORIES
MODELS
MODERN MATHEMATICS
MULTIPLICATION
MUSEUMS

NATURAL RESOURCES
NATURAL SCIENCES
NATURE CENTERS
NOISE (SOUND)
NONFORMAL EDUCATION
NUCLEAR ENERGY
NUCLEAR PHYSICS
NUCLEAR POWER PLANT TECHNOLOGY
NUCLEAR POWER PLANTS
NUCLEAR TECHNICIANS
NUCLEAR WARFARE
NUCLEIC ACIDS
NUMBER CONCEPTS
NUMBER SYSTEMS
NUMBERS

OCEAN ENGINEERING
OCEANOGRAPHY
OCEANOLOGY
OPTICS
ORGANIC CHEMISTRY
ORNITHOLOGY
OUTDOOR ACTIVITIES
OUTDOOR EDUCATION
OVERPOPULATION
OXIDATION

PALEONTOLOGY
PERCENTAGE
PESTICIDES
PESTS
PETROLEUM
PHYSICAL ENVIRONMENT
PHYSICAL SCIENCES
PHYSICS
PHYSIOLOGY
PIAGETIAN THEORY
PLACE VALUE
PLANE GEOMETRY
PLANT GROWTH
PLANT IDENTIFICATION
PLANT PATHOLOGY
PLANT PROPOGATA
PLATE TECTONICS
POISONS
POLICY FORMATION

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SCIENCE, MATHEMATICS, AND ENVIRONMENTAL EDUCATION

APPLICABLE TERMS

SE

POLLUTION
POLYMERS
POPULATION EDUCATION
POPULATION GROWTH
POSTSECONDARY EDUCATION
POTENTIOMETERS (INSTRUMENTS)
POWER TECHNOLOGY
PRACTICAL MATHEMATICS
PRESERVICE TEACHER EDUCATION
PRESSURE (PHYSICS)
PRIME NUMBERS
PROBABILITY
PROBLEM SOLVING
PROBLEMS (MATHEMATICS)
PROCESS EDUCATION
PROGRAM DESCRIPTIONS

QUANTUM MECHANICS

RADAR
RADIATION
RADIATION BIOLOGY
RADIATION EFFECTS
RADIOISOTOPES
RATIONAL NUMBERS
RATIOS (MATHEMATICS)
RECIPROCALS (MATHEMATICS)
RELATIVITY
REMEDIAL MATHEMATICS
REPRODUCTION (BIOLOGY)
RESEARCH
RESOURCES
RH FACTORS
RNA
ROBOTICS
ROBOTS
ROLE MODELS

SAFETY
SAFETY EDUCATION
SAFETY EQUIPMENT
SANITARY FACILITIES
SANITATION
SATELLITES (AEROSPACE)
SCHOOL SAFETY
SCIENCE ACTIVITIES
SCIENCE AND SOCIETY
SCIENCE CAREERS
SCIENCE CLUBS
SCIENCE CONSULTANTS
SCIENCE COURSE IMPROVEMENT PROJECTS
SCIENCE COURSES
SCIENCE CURRICULUM
SCIENCE DEPARTMENTS
SCIENCE EDUCATION
SCIENCE EQUIPMENT
SCIENCE EXPERIMENTS
SCIENCE FACILITIES
SCIENCE FAIRS
SCIENCE HISTORY
SCIENCE INSTITUTES
SCIENCE INSTRUCTION
SCIENCE INTERESTS
SCIENCE LABORATORIES
SCIENCE MATERIALS
SCIENCE PROGRAMS
SCIENCE PROJECTS
SCIENCE SUPERVISION
SCIENCE TEACHERS
SCIENCE TEACHING CENTERS
SCIENCE TESTS
SCIENCE UNITS
SCIENCES
SCIENTIFIC ATTITUDES
SCIENTIFIC CONCEPTS
SCIENTIFIC ENTERPRISE
SCIENTIFIC LITERACY
SCIENTIFIC MANPOWER
SCIENTIFIC METHODOLOGY
SCIENTIFIC PERSONNEL
SCIENTIFIC PRINCIPLES
SCIENTIFIC RESEARCH
SCIENTISTS
SECONDARY EDUCATION
SECONDARY SCHOOL MATHEMATICS
SECONDARY SCHOOL SCIENCE
SEISMOLOGY
SEMICONDUCTORS
SET THEORY
SEX DIFFERENCES
SEX DISCRIMINATION
SEX ROLE
SEX STEREOTYPES
SIMULATION
SOCIOBIOLOGY
SOIL CONSERVATION
SOIL SCIENCE
SOLAR ENERGY
SOLID GEOMETRY
SOLID WASTES
SPACE EXPLORATION
SPACE SCIENCES
SPECTROSCOPY
STATISTICS (MATHEMATICS)
STRUCTURAL ANALYSIS (SCIENCE)
SUBTRACTION
SUMMER SCIENCE PROGRAMS
SYMBOLS (MATHEMATICS)
SYMMETRY

TEACHER EDUCATION
TEACHER EFFECTIVENESS
TEACHING METHODS
TEACHING MODELS
TEACHING SKILLS
TEACHING STYLES
TECHNICAL EDUCATION
TECHNOLOGICAL ADVANCEMENT
TECHNOLOGICAL LITERACY
TECHNOLOGY
TECHNOLOGY TRANSFER
TEST ANXIETY
TESTS
TEXTBOOKS
THEORIES
THERMAL ENVIRONMENT
THERMODYNAMICS
TOPOLOGY
TOXICOLOGY
TOXINS
TRAILS
TRANSFORMATIONS (MATHEMATICS)
TREES
TRIGONOMETRY
TUTORIAL PROGRAMS
TUTORING

UNDERGRADUATE STUDY
UNITS OF STUDY
URBAN ENVIRONMENT

VALUES EDUCATION
VOLUME (MATHEMATICS)

WASTE DISPOSAL
WASTES
WATER
WATER POLLUTION
WATER QUALITY
WATER RESOURCES
WATER TREATMENT
WEATHER
WEEDS
WEIGHT (MASS)
WHOLE NUMBERS
WILDLIFE
WILDLIFE MANAGEMENT
WORD PROBLEMS (MATHEMATICS)
WORK (PHYSICS)
WORKSHEETS
WORKSHOPS
WORLD PROBLEMS

ZOOLOGY
ZOOS

SOCIAL STUDIES/SOCIAL SCIENCE EDUCATION (SO)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

All aspects of Social Studies and Social Science Education (the principal relevant disciplines being: anthropology, archaeology, civics, economics, education, geography, history, law, philosophy, political science, social psychology, sociology), including values education (and the social aspects of environmental education and sex education), and international education, comparative education, and cross-cultural studies in all subject areas (K-12). The content of the social science disciplines (including their contributions to knowledge and understanding of the educational process). The application of learning theory, curriculum theory, child development theory, and instructional theory to social studies/social sciences education. Research and development projects in the social studies/social sciences. Ethnic heritage, gender equity, aging, and social bias/discrimination topics.

Also covered are music, art, and architecture as related to the fine arts.

II. EXPLANATORY NOTES

Documents concerned with comparative education in general, as well as at the K-12 level, are processed by SO. Documents concerned with comparative education at the higher education level are processed by the HE Clearinghouse.

III. BRIEF STATEMENT

All aspects of Social Studies and Social Science Education, including values education (and the social aspects of environmental education and sex education), international education, comparative education, and cross-cultural studies in all subject areas (K-12). Ethnic heritage, gender equity, aging, and social bias/discrimination topics. Also covered are music, art, and architecture as related to the fine arts.

SOCIAL STUDIES/SOCIAL SCIENCE EDUCATION
APPLICABLE TERMS

SO

ABORTIONS (CURRICULUM RELATED SOCIAL CONCERNS)
ACADEMIC ACHIEVEMENT
ACTIVISM
ADJUSTMENT (TO ENVIRONMENT)
AFFECTIVE OBJECTIVES
AFFECTIVE BEHAVIOR
AFFIRMATIVE ACTION
AFRICAN AMERICAN STUDIES
AFRICAN STUDIES
AGING (CURRICULUM RELATED SOCIAL CONCERN)
ALCOHOLISM (SOCIAL PROBLEM)
AMERICAN GOVERNMENT
AMERICAN STUDIES
ANDROGYNY
ANTHROPOLOGY
ARCHAEOLOGY
ARCHITECTURE (AS IT RELATES TO SOCIAL STUDIES)
AREA STUDIES
ART EDUCATION
ART CRITICISM
ART
ASIAN STUDIES
AUTHORITARIANISM

BASIC SKILLS (SOCIAL STUDIES)
BEHAVIOR CHANGE
BEHAVIOR THEORIES
BEHAVIORAL SCIENCES RESEARCH
BEHAVIORAL SCIENCES
BLACK STUDIES

CASE STUDIES (RELATING TO THE SOCIAL SCIENCES)
CENSORSHIP
CHANGE STRATEGIES (SOCIAL STUDIES)
CHANGING ATTITUDES
CHILD PSYCHOLOGY
CHILD DEVELOPMENT (AS PART OF PSYCHOLOGY)
CITIZEN PARTICIPATION
CITIZENSHIP
CIVICS
CIVIL LIBERTIES
CIVIL RIGHTS
CLASSROOM GAMES (SOCIAL STUDIES)
COMMUNISM
COMMUNITY STUDIES
COMMUNITY RESOURCES
COMMUNITY ACTION
COMPARATIVE EDUCATION
COMPUTER ASSISTED INSTRUCTION (SOCIAL STUDIES)
CONFLICT RESOLUTION
CONSERVATION EDUCATION
CONSTITUTIONAL LAW
CONSTITUTIONAL HISTORY
CONSUMER EDUCATION (AS PART OF SOCIAL STUDIES)
CONSUMER ECONOMICS
COURT LITIGATION
CREATIVE THINKING
CRIME
CRITICAL THINKING
CROSS CULTURAL STUDIES
CROSS CULTURAL TRAINING (CULTURAL WARENESS)
CULTURAL DIFFERENCES
CULTURAL AWARENESS
CULTURAL EDUCATION
CULTURAL BACKGROUND
CULTURAL CONTEXT
CULTURAL EXCHANGE
CULTURAL FACTORS
CULTURAL IMAGES
CULTURAL PLURALISM
CULTURALLY DISADVANTAGED
CULTURE CONFLICT
CURRENT EVENTS
CURRICULUM DEVELOPMENT (THEORY)
CURRICULUM GUIDES
CURRICULUM DESIGN (THEORY)
CURRICULUM EVALUATION (SOCIAL STUDIES)

DEATH (CURRICULUM RELATED SOCIAL CONCERN)
DEATH EDUCATION (CURRICULUM RELATED SOCIAL CONCERN)
DECISION MAKING
DEDUCTIVE METHODS (SOCIAL STUDIES)
DEMOCRATIC VALUES
DEMOGRAPHY
DEVELOPED NATIONS
DEVELOPING NATIONS
DISCOVERY LEARNING
DISCRIMINATORY ATTITUDES (SOCIAL)
DISCUSSION (TEACHING TECHNIQUE)
DISSENT
DIVORCE (SOCIAL PROBLEM)
DRUG ABUSE (SOCIAL PROBLEM)
DUE PROCESS

ECONOMIC FACTORS
ECONOMICS EDUCATION
ECONOMICS (GENERAL) (AS PART OF SOCIAL STUDIES)
EDUCATION
EDUCATIONAL GAMES (SOCIAL STUDIES)
EDUCATIONAL OBJECTIVES
EDUCATIONAL INNOVATION
EDUCATIONAL CHANGE
EDUCATIONAL ALTERNATIVES
EDUCATIONAL SOCIOLOGY
EDUCATIONAL PSYCHOLOGY
EDUCATIONAL RESEARCH
EDUCATIONAL THEORY
EDUCATIONAL HISTORY
EDUCATIONAL PHILOSOPHY
EDUCATIONAL IMPROVEMENT
EDUCATIONAL ECONOMICS
EFFECTIVE TEACHING (SOCIAL STUDIES)
ENERGY CONSERVATION (SOCIAL STUDIES)
ENERGY
ENVIRONMENTAL EDUCATION (AS PART OF SOCIAL STUDIES)
ETHICAL INSTRUCTION
ETHNIC GROUPS
ETHNIC ORIGINS
ETHNIC MINORITIES
ETHNIC RELATIONS
ETHNIC STUDIES
ETHNIC STEREOTYPES
ETHNOLOGY
EUROPEAN STUDIES

FAMILY (SOCIOLOGICAL UNIT)
FAMILY ENVIRONMENT
FAMILY CHARACTERISTICS
FAMILY LIFE EDUCATION
FEMALES
FEMINISM
FOREIGN CULTURE
FOREIGN RELATIONS
FOUNDATIONS OF EDUCATION
FUTURES (OF SOCIETY)
FUTURISM

GAME THEORY (SOCIAL STUDIES)
GAMES (SOCIAL STUDIES)
GEOGRAPHIC REGIONS
GEOGRAPHY INSTRUCTION
GEOGRAPHY
GERONTOLOGY (SOCIAL PROBLEM)
GLOBAL EDUCATION
GOVERNMENT
GOVERNMENT GROUP RELATIONS
GROUP RELATIONS

HERITAGE EDUCATION
HISTORY INSTRUCTION
HISTORY
HUMAN RELATIONS PROGRAMS
HUMAN RELATIONS
HUMAN RELATIONS UNITS
HUMAN SERVICES (SOCIAL WELFARE)
HUMAN RIGHTS
HUMANISM
HUMANITIES INSTRUCTION (ART, MUSIC, CULTURAL STUDIES)

SO

SOCIAL STUDIES/SOCIAL SCIENCE EDUCATION
APPLICABLE TERMS

HUMANITIES (ART, MUSIC, CULTURAL STUDIES)
HUMANIZATION

INDIAN HISTORY
INDIVIDUALIZED PROGRAMS (THEORY)
INDIVIDUALIZED INSTRUCTION (THEORY)
INDUCTIVE METHODS (SOCIAL STUDIES)
INQUIRY TRAINING
INSTRUCTIONAL INNOVATION (SOCIAL STUDIES)
INTELLECTUAL DEVELOPMENT
INTELLECTUAL DISCIPLINES (SOCIAL SCIENCES)
INTELLECTUAL PERFORMANCE
INTERACTION PROCESS ANALYSIS (BEHAVIORAL SCIENCES)
INTERCULTURAL PROGRAMS
INTERDISCIPLINARY APPROACH
INTERFAITH RELATIONS
INTERGROUP RELATIONS (HUMAN RELATIONS)
INTERGROUP EDUCATION
INTERNATIONAL EDUCATION

LABOR PROBLEMS
LAW INSTRUCTION
LAW ENFORCEMENT
LEADERSHIP TRAINING (COMMUNITY)
LEADERSHIP RESPONSIBILITY
LEARNING
LEARNING ACTIVITIES (SOCIAL STUDIES)
LEARNING MOTIVATION
LEARNING PROCESSES
LEARNING THEORIES
LEGAL EDUCATION
LEGAL PROBLEMS
LEISURE TIMES
LOCAL HISTORY
LOGICAL THINKING

MARRIAGE
MATERIAL CULTURE
MENTAL DEVELOPMENT
MEXICAN AMERICAN HISTORY
MIDDLE EASTERN STUDIES
MINORITY GROUPS
MODELS (THEORY)
MORAL DEVELOPMENT
MOTIVATION TECHNIQUES
MOTIVATION (ENVIRONMENT)
MUSEUM EDUCATION
MUSEUMS
MUSIC
MUSIC EDUCATION

NON-WESTERN CIVILIZATION

OBJECTIVES
ORAL HISTORY
ORGANIZATIONAL CLIMATE
OVERPOPULATION

PARENT ATTITUDES
PEACE
PERCEPTION (PSYCHOLOGY)
PERCEPTUAL DEVELOPMENT
PERCEPTUAL MOTOR COORDINATION
PERSONALITY
PERSONALITY DEVELOPMENT
PHILOSOPHY
POLITICAL ISSUES
POLITICAL SCIENCE
POLITICAL POWER
POLITICAL AFFILIATION
POLITICAL INFLUENCES
POLITICAL SOCIALIZATION
POLLUTION
POPULATION TRENDS
POPULATION EDUCATION (SOCIAL STUDIES)
POPULATION GROWTH
POWER STRUCTURE
PROBLEM SOLVING
PSYCHOLOGICAL CHARACTERISTICS
PSYCHOLOGY (AS A SOCIAL SCIENCE)
PSYCHOLOGY OF LEARNING
PUBLIC AFFAIRS EDUCATION

QUALITY OF LIFE

RACE RELATIONS
RACIAL ATTITUDES
RACIAL DIFFERENCES
RACIAL DISCRIMINATION
RACIAL FACTORS
REINFORCEMENT (PSYCHOLOGY)
RELEVANCE (EDUCATION)
RELIGIOUS EDUCATION
RESEARCH METHODOLOGY
RESEARCH REVIEW (PUBLICATIONS)
RESEARCH
ROLE CONFLICT
ROLE PERCEPTION
ROLE THEORY

SELF ACTUALIZATION
SELF CONCEPT
SENSITIVITY TRAINING
SEX BIAS
SEX DIFFERENCES (SOCIAL PROBLEM)
SEX DISCRIMINATION (BEHAVIORIAL SCIENCES)
SEX EDUCATION (CURRICULUM RELATED SEX FAIRNESS)
SEX ROLE
SEX STEREOTYPES SOCIAL CONCERN)
SEXUALITY (PSYCHOLOGY)
SIMULATION (SOCIAL STUDIES)
SKILL DEVELOPMENT (PSYCHOLOGY)
SOCIAL ACTION
SOCIAL ATTITUDES
SOCIAL BEHAVIOR
SOCIAL CHANGE
SOCIAL DEVELOPMENT
SOCIAL INFLUENCES
SOCIAL PLANNING
SOCIAL PROBLEMS
SOCIAL PSYCHOLOGY
SOCIAL RELATIONS
SOCIAL STUDIES UNITS
SOCIAL SYSTEMS
SOCIAL STUDIES TEACHERS
SOCIAL SCIENCE RESEARCH
SOCIAL SCIENCES
SOCIAL STUDIES
SOCIAL VALUES
SOCIAL WORKERS
SOCIAL WELFARE
SOCIAL STRATIFICATION
SOCIALIZATION
SOCIALLY DEVIANT BEHAVIOR
SOCIALLY DISADVANTAGED
SOCIOECONOMIC INFLUENCES
SOCIOECONOMIC BACKGROUND
SOCIOECONOMIC STATUS
SOCIOLOGY
STATE LEGISLATION
STATE GOVERNMENT STATE LAWS (SOCIAL STUDIES)
STATE HISTORY
STEREOTYPES
STUDENT CHARACTERISTICS
STUDENT PARTICIPATION
STUDENT BEHAVIOR
STUDENT ATTITUDES
STUDENT TEACHER RELATIONSHIP
STUDENT ALIENATION
STUDENT SUBCULTURES
STUDENT ROLE
STUDENT RIGHTS
SYSTEMS ANALYSIS
SYSTEMS APPROACH

SOCIAL STUDIES/SOCIAL SCIENCE EDUCATION
APPLICABLE TERMS

TEACHER EDUCATION (SOCIAL STUDIES)
TEACHING METHODS (THEORY) (SOCIAL STUDIES)
TEACHING (SOCIAL STUDIES)
TEACHING MODELS (SOCIAL STUDIES)
TRANSFER OF TRAINING (PSYCHOLOGY)

UNITED STATES HISTORY
URBAN STUDIES
URBANIZATION

VALUES
VISUAL PERCEPTION (PSYCHOLOGY)
VISUAL DISCRIMINATION (PSYCHOLOGY)
VISUAL ARTS

WAR
WOMENS STUDIES
WOMENS EDUCATION
WORLD AFFAIRS
WORLD PROBLEMS
WORLD HISTORY

YOUTH
YOUTH PROGRAMS

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TEACHER EDUCATION (SP)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

- **Teachers**
  Faculty of schools, colleges, universities, and departments of education, including instructional staff in schools, businesses, and nonschool settings. Preservice, inservice, and continuing professional development. Recruitment, selection, licensing, certification, evaluation, retention, and retirement. School personnel supply and demand (inclusive of subject discipline and race/ethnicity data).

- **Teaching and Teacher Education**
  Teaching practice and methods, philosophy, and curriculum (other than that covered by the discipline-oriented Clearinghouse). Organization, administration, governance, finance, and legal issues relating to teaching and teacher education programs and institutions (including state education agencies (SEA's), local education agencies (LEA's), higher education institutions, public and private schools, professional development schools, clinical schools, teacher centers, businesses, and nonschool establishments.

- **Health, Physical Education, Recreation, and Dance (HPERD)**
  Health education and promotion (including disease control, substance abuse control, and AIDS education), physical education (inclusive of movement education), physical fitness, safety education, the sports disciplines, recreation education, nutrition education, and dance education (with the emphasis on movement and physical education).

II. EXPLANATORY NOTES

Teacher education curriculum materials that concentrate or focus primarily on the subject content area or discipline to be taught (e.g., a foreign language, social studies, mathematics, etc.) are transferred to the appropriate discipline-oriented Clearinghouse.

III. BRIEF STATEMENT

School personnel at all levels. Teacher recruitment, selection, licensing, certification, training, preservice and inservice preparation, evaluation, retention, and retirement. The theory, philosophy, and practice of teaching. Organization, administration, finance, and legal issues relating to teacher education programs and institutions. All aspects of health, physical, recreation, and dance education.

TEACHER EDUCATION

APPLICABLE TERMS

SP

ACCOUNTABILITY
ACCREDITATION (INSTITUTIONS)
ADMINISTRATOR ATTITUDES
AFFECTIVE BEHAVIOR
AFFECTIVE OBJECTIVES
AFFILIATED SCHOOLS
AGENCY COOPERATION
AIDES (TEACHER)
AIDS
ALCOHOL EDUCATION
ALTERNATIVE TEACHER CERTIFICATION
ATHLETES
ATHLETIC COACHES
ATHLETICS

BEGINNING TEACHER INDUCTION
BEGINNING TEACHERS
BEHAVIOR CHANGE (BEHAVIOR MODIFICATION)
BEHAVIOR PATTERNS
BEHAVIORAL OBJECTIVES
BOARD OF EDUCATION POLICY/ROLE

CARDIOVASCULAR SYSTEM
CHANGE AGENTS
CHANGING ATTITUDES
CLASS ACTIVITIES
CLASSROOM ENVIRONMENT
CLASSROOM OBSERVATION TECHNIQUES
CLASSROOM TECHNIQUES
COGNITIVE PROCESSES
COLLEGE COMMUNITY RELATIONSHIPS
COLLEGE SCHOOL COOPERATION
COLLEGE SUPERVISORS
COLLEGIALITY
COMMUNITY RECREATION
COMMUNITY RESOURCE VOLUNTEERS
COOPERATING TEACHERS
CREATIVE TEACHING
CRITICAL THINKING
CROSS AGE TEACHING
CROSS CULTURAL TRAINING
CURRICULUM
CURRICULUM DESIGN
CURRICULUM DEVELOPMENT
CURRICULUM GUIDES
CURRICULUM STUDY CENTERS

DANCE
DANCE EDUCATION
DECISION MAKING
DENTAL HEALTH
DIFFERENTIATED STAFFS
DISCIPLINE
DISCIPLINE PROBLEMS
DISCOVERY LEARNING
DISCUSSION (TEACHING TECHNIQUE)
DROPOUTS
DRUG EDUCATION

EDUCATION COURSES
EDUCATION MAJORS
EDUCATIONAL CHANGE
EDUCATIONAL ENVIRONMENT
EDUCATIONAL IMPROVEMENT
EDUCATIONAL INNOVATION
EDUCATIONAL NEEDS
EDUCATIONAL OBJECTIVES
EDUCATIONAL PHILOSOPHY
EDUCATIONAL PLANNING
EDUCATIONAL PRINCIPLES
EDUCATIONAL RESEARCH/RESEARCHERS
EDUCATIONAL RESOURCES
EDUCATIONAL STRATEGIES
EDUCATIONAL THEORY
EDUCATIONAL TECHNOLOGY
ELEMENTARY SCHOOL TEACHERS
EVALUATION CRITERIA
EVALUATION METHODS
EXERCISE
EXERCISE PHYSIOLOGY
EXPERIMENTAL TEACHING
EXTENDED TEACHER EDUCATION PROGRAMS

FACULTY
FACULTY DEVELOPMENT
FIELD EXPERIENCE PROGRAMS
FIRST AID
FOUNDATIONS OF EDUCATION

GENERAL EDUCATION
GRADES
GRADING

HEALTH EDUCATION
HEALTH PROMOTION
HYGIENE

IMMUNIZATION PROGRAMS
INDIVIDUAL INSTRUCTION
INDIVIDUALIZED INSTRUCTION
INDIVIDUALIZED PROGRAMS
INJURIES
INSERVICE TEACHER EDUCATION
INSTITUTES (TRAINING PROGRAMS)
INSTITUTIONAL ROLE
INSTRUCTION
INSTRUCTIONAL DEVELOPMENT
INSTRUCTIONAL IMPROVEMENT
INSTRUCTIONAL INNOVATION
INSTRUCTIONAL MATERIALS
INTERACTION PROCESS ANALYSIS
INTERDISCIPLINARY APPROACH
INTERNSHIP PROGRAMS

LABORATORY SCHOOLS
LABORATORY TRAINING
LEARNING PROCESSES
LEARNING STRATEGIES
LEARNING THEORIES
LEISURE TIME
LIFETIME SPORTS

MAINSTREAMING
MASTER TEACHERS
MEASUREMENT TECHNIQUES
MEDICAL SERVICES
MENTORS
METHODS COURSES
MICROTEACHING
MOTIVATION TECHNIQUES (TEACHING)
MOVEMENT EDUCATION

NONSCHOOL EDUCATIONAL PROGRAMS
NONTRADITIONAL EDUCATION
NONVERBAL COMMUNICATION
NUTRITION INSTRUCTION

OPEN EDUCATION
OPEN PLAN SCHOOLS
ORGANIZATIONAL CLIMATE
OUTDOOR EDUCATION

PARAPROFESSIONAL SCHOOL PERSONNEL
PARENT TEACHER COOPERATION
PARKS
PARTICIPATIVE DECISION MAKING
PEER TEACHING
PERFORMANCE BASED TEACHER EDUCATION
PHYSICAL DEVELOPMENT
PHYSICAL EDUCATION
PHYSICAL EDUCATION TEACHERS
PHYSICAL FITNESS
PLAY
PLAYGROUNDS
POSTDOCTORAL EDUCATION
PRACTICUMS
PREGNANCY
PRESERVICE TEACHER EDUCATION
PREVENTION
PROFESSIONAL AUTONOMY
PROFESSIONAL CONTINUING EDUCATION
PROFESSIONAL DEVELOPMENT
PROFESSIONAL RECOGNITION
PROGRAM DESCRIPTIONS
PROGRAM DEVELOPMENT
PROGRAM EFFECTIVENESS
PROGRAM PLANNING

SP

TEACHER EDUCATION

APPLICABLE TERMS

PROTOCOL MATERIALS
PSYCHOMOTOR SKILLS
PUBLIC HEALTH

RECREATION
REINFORCEMENT
RELEVANCE (EDUCATION)
RESEARCH AND DEVELOPMENT CENTERS
ROLE PERCEPTION

SAFETY
SCHOOL BUSINESS RELATIONSHIP
SCHOOL COMMUNITY RELATIONSHIP
SCHOOL HEALTH SERVICES
SCHOOL PERSONNEL
SCHOOL SAFETY
SCHOOLS OF EDUCATION
SECONDARY SCHOOL EDUCATION
SENSITIVITY TRAINING
SEX EDUCATION
SPEECH COMMUNICATION STAFF DEVELOPMENT
STAFF ROLE
STAFF UTILIZATION
STATE BOARDS OF EDUCATION
STATE DEPARTMENTS OF EDUCATION
STATE STANDARDS
STRESS VARIABLES
STUDENT ATTITUDES
STUDENT CENTERED CURRICULUM
STUDENT EVALUATION
STUDENT EVALUATION OF TEACHER PERFORMANCE
STUDENT TEACHERS
STUDENT TEACHING
STUDENT VOLUNTEERS
SUPERVISORY METHODS
SUPERVISORY TRAINING

TEACHER ADMINISTRATOR RELATIONSHIP
TEACHER AIDES
TEACHER ASSOCIATIONS
TEACHER ATTITUDES
TEACHER BEHAVIOR
TEACHER BURNOUT
TEACHER CENTERS
TEACHER CERTIFICATION
TEACHER CHARACTERISTICS
TEACHER EDUCATION
TEACHER EDUCATION CURRICULUM
TEACHER EDUCATION PROGRAMS
TEACHER EDUCATOR EDUCATION
TEACHER EDUCATORS
TEACHER EFFECTIVENESS
TEACHER EMPLOYMENT
TEACHER EVALUATION
TEACHER IMPROVEMENT
TEACHER INFLUENCE
TEACHER MILITANCY
TEACHER MORALE
TEACHER MOTIVATION
TEACHER ORIENTATION
TEACHER PARTICIPATION
TEACHER PERSISTENCE
TEACHER PROMOTION
TEACHER RECRUITMENT
TEACHER RETIREMENT
TEACHER ROLE
TEACHER SALARIES
TEACHER SELECTION
TEACHER SHORTAGE
TEACHER STEREOTYPES
TEACHER STRIKES
TEACHER STUDENT RELATIONSHIP
TEACHER SUPERVISION
TEACHER SUPPLY AND DEMAND
TEACHER WELFARE
TEACHER WORKSHOPS
TEACHERS
TEACHING (OCCUPATION)
TEACHING ASSISTANTS
TEACHING CONDITIONS
TEACHING EXPERIENCE
TEACHING GUIDES
TEACHING METHODS
TEACHING MODELS
TEACHING SKILLS
TEACHING STYLES
TEAM TEACHING
TENURE
TESTING
THINKING SKILLS
TIME FACTORS (LEARNING)
TUTORIAL PROGRAMS
TUTORING

VERBAL COMMUNICATION
VOLUNTEERS

WOMENS ATHLETICS

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TESTS, MEASUREMENT, AND EVALUATION (TM)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

- **Methodology of Measurement and Evaluation**
  Measurement techniques, research techniques, and evaluation models. Ways of collecting, quantifying, and analyzing data.

- **Evaluation of Programs, Projects, Procedures**
  Evaluation design, evaluation procedures, and instrumentation to be used (regardless of subject area or population involved). May include outstanding evaluation reports whose methodology could be of special interest, but should not include reports in which methodology and instrumentation are secondary to programmatic concerns.

- **Research and Experimental Design and Methodology**
  The selection of appropriate research and experimental designs and methods. The solution of problems associated with such designs and methods. Statistical procedures used to analyze data.

- **Tests and Measurement Devices/Instrumentation**
  Descriptions and reviews of tests and measurement devices, their characteristics, and their availability. Analyses of the reliability and validity of such instruments. How tests and measurement instruments should be used for greatest effectiveness. Developmental history of given tests and measurement instruments, including recent developments.

- **Statistical Compilations**
  Large compilations of education-related statistical data, such as the production of the National Center for Education Statistics (NCES) and selected outputs of the Bureau of the Census, State Education Agencies, etc., when those compilations do not fall within the specific scope of another Clearinghouse. Of particular interest are the statistical products of evaluative efforts such as the National Assessment of Educational Progress (NAEP).

- **Human Development**
  Human development and maturation in general, when *not* handled by the other Clearinghouses, e.g., infants and young children (PS), handicapped/disabled (EC), mathematical reasoning (SE), moral values (SO), etc.

- **Learning Theory**
  Learning theory and cognitive theory in general, when *not* handled by the other Clearinghouses, e.g., infants and young children (PS), handicapped/disabled (EC), language acquisition (FL, PS), etc.

TESTS, MEASUREMENT, AND EVALUATION (TM)

II. EXPLANATORY NOTES

None.

III. BRIEF STATEMENT

All aspects of tests and other measurement devices. The design and methodology of research, measurement, and evaluation. The evaluation of programs and projects. The application of tests, measurement, and evaluation devices/instrumentation in educational projects and programs.

TESTS, MEASUREMENT, AND EVALUATION
APPLICABLE TERMS

TM

ABILITY
ABILITY GROUPING
ABILITY IDENTIFICATION
ABSTRACT REASONING
ACADEMIC ABILITY
ACADEMIC ACHIEVEMENT
ACADEMIC APTITUDE
ACADEMIC ASPIRATION
ACADEMIC FAILURE
ACADEMIC PERSISTENCE
ACADEMIC RECORDS
ACADEMIC STANDARDS
ACCOUNTABILITY
ACCREDITATION (INSTITUTIONS)
ACHIEVEMENT
ACHIEVEMENT GAINS
ACHIEVEMENT NEED
ACHIEVEMENT RATING
ACHIEVEMENT TESTS
ACTION RESEARCH
ADAPTIVE TESTING
ADMINISTRATOR EVALUATION
ADMINISTRATOR SELECTION
ADMISSION (SCHOOL)
ADMISSION CRITERIA
ADOLESCENT DEVELOPMENT
ADVANCE ORGANIZERS
ADVANCED PLACEMENT
ADVANCED PLACEMENT PROGRAMS
ADVISORY COMMITTEES
ADVOCACY
AFFECTIVE MEASURES
AGE GRADE PLACEMENT
AGE GROUPS
ALGORITHMS
ANALYSIS OF COVARIANCE
ANALYSIS OF VARIANCE
ANSWER KEYS
ANSWER SHEETS
APTITUDE
APTITUDE TESTS
APTITUDE TREATMENT INTERACTION
ASSESSMENT CENTERS (PERSONNEL)
ASSISTED TESTING
ATTITUDE CHANGE
ATTITUDE MEASURES
ATTITUDES
ATTRITION (RESEARCH STUDIES)

BAYESIAN STATISTICS
BEHAVIOR CHANGE
BEHAVIOR DISORDERS
BEHAVIOR PATTERNS
BEHAVIOR PROBLEMS
BEHAVIOR THEORIES
BEHAVIORAL OBJECTIVES
BEHAVIORAL SCIENCE RESEARCH
BEHAVIORISM
BIAS
BIOGRAPHICAL INVENTORIES (MONTE CARLO METHODS)

CASE STUDIES
CERTIFICATION
CHARTS
CHEATING
CHECK LISTS
CHI SQUARE
CHILD DEVELOPMENT
CHILD PSYCHOLOGY
MULTIPLE CHOICE TESTS
CHRONOLOGICAL AGE
CLASS RANK
CLASS SIZE
CLASSICAL CONDITIONING
CLASSIFICATION
CLASSROOM OBSERVATION TECHNIQUES
CLASSROOM RESEARCH
CLINICAL DIAGNOSIS
CLOZE PROCEDURE
CLUBS
CLUSTER ANALYSIS
CLUSTER GROUPING
COACHING
COGNITION
COGNITIVE ABILITY
COGNITIVE DEVELOPMENT
COGNITIVE MEASUREMENT
COGNITIVE OBJECTIVES
COGNITIVE PROCESSES
COGNITIVE PSYCHOLOGY
COGNITIVE RESTRUCTURING
COGNITIVE STRUCTURES
COGNITIVE STYLE
COGNITIVE TESTS
COHORT ANALYSIS
COLLEGE ADMISSION
COLLEGE ENTRANCE EXAMINATIONS
COMMUNITY ATTITUDES
COMMUNITY SURVEYS
COMPARATIVE ANALYSIS
COMPARATIVE TESTING
COMPETENCE
COMPETENCY BASED EDUCATION
COMPETENCY TESTING
COMPETENCY TESTS
COMPONENTIAL ANALYSIS
COMPUTER ASSISTED TESTING
COMPUTER GRAPHICS
COMPUTER SIMULATION
CONCEPT FORMATION
CONCEPT MEASURES
CONCURRENT VALIDITY
CONFIDENCE TESTING
CONFIDENTIAL RECORDS
CONFIDENTIALITY
CONSTRUCT VALIDITY
CONTENT ANALYSIS
CONTENT VALIDITY
CONTEXT CLUES
CONTROL GROUPS
CORRELATION
COST EFFECTIVENESS
COURSE EVALUATION
CREATIVITY RESEARCH
CREATIVITY TESTS
CREDENTIALS
CRITERION REFERENCED
CRITERION REFERENCED TESTS
CRITICAL INCIDENTS METHOD
CRITICAL THINKING
CROSS SECTIONAL STUDIES
CULTURE FAIR TESTS
CURRICULUM EVALUATION
CURRICULUM RESEARCH
CUTTING SCORES

DATA
DATA ANALYSIS
DATA COLLECTION
DATA INTERPRETATION
DATA PROCESSING
DATABASE MANAGEMENT
DECISION MAKING
DECISION MAKING SKILLS
DELPHI TECHNIQUE
DESIGN
DEVELOPMENTAL STAGES
DEVELOPMENTAL TASKS
DIAGNOSIS
DIAGNOSTIC TESTS
DIFFICULTY LEVEL
DISCOURSE ANALYSIS
DISCRIMINANT
DISCRIMINANT ANALYSIS
DISTRACTORS (TESTS)
DIVERGENT THINKING
DOCUMENTATION

ECONOMIC RESEARCH
EDUCATIONAL ASSESSMENT
EDUCATIONAL ATTITUDES
EDUCATIONAL CERTIFICATES
EDUCATIONAL DIAGNOSIS
EDUCATIONAL EXPERIMENTS
EDUCATIONAL OBJECTIVES
EDUCATIONAL PSYCHOLOGY
EDUCATIONAL QUALITY
EDUCATIONAL RESEARCH
EDUCATIONAL RESEARCHERS
EDUCATIONAL TESTING
EDUCATIONAL THEORIES
EFFECT SIZE
EFFICIENCY
EMPLOYMENT QUALIFICATIONS
ENTRANCE EXAMINATIONS
ENVIRONMENTAL RESEARCH
EQUATED SCORES
EQUIVALENCY TESTS
EQUIVALENT SCORES
ERROR PATTERNS

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TM

TESTS, MEASUREMENT, AND EVALUATION
APPLICABLE TERMS

ERROR OF MEASUREMENT
ESSAY TESTS
ESTIMATION
ETHNIC BIAS
EVALUATION
EVALUATION (GROUPS)
EVALUATION (INDIVIDUALS)
EVALUATION CRITERIA
EVALUATION METHODS
EVALUATION NEEDS
EVALUATION PROBLEMS
EVALUATION RESEARCH
EVALUATION UTILIZATION
EVALUATION OF TEACHER PERFORMANCE
EVALUATIVE THINKING
EVALUATORS
EXAMINATIONS
EXAMINATIONS (PROFESSIONS)
EXAMINERS
EXPECTANCY TABLES
EXPERIMENTAL PSYCHOLOGY

FACTOR ANALYSIS
FACTOR STRUCTURE
FEASIBILITY STUDIES
FIELD DEPENDENCE
FIELD DEPENDENCE INDEPENDENCE
FOLLOWUP STUDIES
FORMATIVE EVALUATION

GENERALIZABILITY THEORY
GOAL ORIENTATION
GOODNESS OF FIT
GRADE EQUIVALENT SCORES
GRADE POINT AVERAGE
GRADE PREDICTION
GRADING
GRADUATE SURVEYS
GRADUATION REQUIREMENTS
GRAPHS
GROUP TESTING
GUESSING (TESTS)

HEURISTICS
HIGH ACHIEVEMENT
HOLISTIC
HOLISTIC EVALUATION
HYPNOSIS
HYPOTHESIS
HYPOTHESIS TESTING

IMPLEMENTATION
INDIVIDUAL DEVELOPMENT
INDIVIDUAL DIFFERENCES
INDIVIDUAL TESTING
INFORMATION TRANSFER
INPUT OUTPUT ANALYSIS
INSTITUTIONAL EVALUATION
INSTRUCTIONAL EFFECTIVENESS
INSTRUCTIONAL MATERIAL
EVALUATION
INTELLECTUAL DEVELOPMENT
INTELLIGENCE
INTELLIGENCE DIFFERENCES
INTELLIGENCE QUOTIENT
INTELLIGENCE TESTS
INTEREST INVENTORIES
INTEREST RESEARCH
INTERRATER RELIABILITY
INTERVALS
INTERVENTION
INTERVIEWS
INTRODUCTORY COURSES
INVENTORIES
INVESTIGATIONS
ITEM ANALYSIS
ITEM BANKS
ITEM SAMPLING

JOB ANALYSIS
JUDGMENT ANALYSIS TECHNIQUE

KNOWLEDGE
KNOWLEDGE LEVEL

LANGUAGE APTITUDE
LANGUAGE PROFICIENCY
LANGUAGE RESEARCH
LANGUAGE TESTS
LANGUAGE USAGE
LATENT TRAIT THEORY
LEARNING
LEARNING EXPERIENCE
LEARNING MODALITIES
LEARNING MOTIVATION
LEARNING PROBLEMS
LEARNING PROCESSES
LEARNING READINESS
LEARNING STRATEGIES
LEARNING THEORIES
LEAST SQUARES
LEAST SQUARES STATISTICS
LICENSING EXAMINATIONS
LICENSING EXAMINATIONS (PROFESSIONS)
LIKELIHOOD STATISTICS
LIKERT SCALES
LINEAR PROGRAMING
LISTENING COMPREHENSION TESTS
LOCUS OF CONTROL
LOGICAL THINKING
LONGITUDINAL STUDIES
LOW ACHIEVEMENT

MAIL SURVEYS
MASTERY LEARNING
MASTERY TESTS
MATCHED GROUPS
MATHEMATICAL CONCEPTS
MATHEMATICAL FORMULAS
MATHEMATICAL LOGIC
MATHEMATICAL MODELS
MATHEMATICS ACHIEVEMENT
MATHEMATICS TESTS
MAXIMUM LIKELIHOOD STATISTICS
MEASUREMENT
MEASUREMENT OBJECTIVES
MEASUREMENT TECHNIQUES
MEASURES
MEASURES (INDIVIDUAL)
MEDICAL CARE EVALUATION
MEDICAL EVALUATION
MEMORIZATION
MEMORY
MENTAL AGE
META ANALYSIS
METACOGNITION
METHODOLOGY
METHODS RESEARCH
MINIMUM COMPETENCIES
MINIMUM COMPETENCY
MINIMUM COMPETENCY TESTING
MONTE CARLO METHODS
MORAL DEVELOPMENT
MORAL VALUES
MULTIDIMENSIONAL SCALING
MULTIMETHOD TECHNIQUES
MULTIPLE CHOICE TESTS
MULTIPLE REGRESSION
MULTIPLE REGRESSION ANALYSIS
MULTISENSORY LEARNING
MULTITRAIT
MULTITRAIT MULTIMETHOD
MULTITRAIT MULTIMETHOD TECHNIQUES
MULTIVARIATE
MULTIVARIATE ANALYSIS

NATIONAL COMPETENCY TESTS
NATIONAL NORMS
NATIONAL SURVEYS
NEEDS ASSESSMENT
NONPARAMETRIC STATISTICS
NONVERBAL ABILITY
NONVERBAL TESTS
NORM
NORM REFERENCED
NORM REFERENCED TESTS
NORMS

OBJECTIVE TESTS
OBJECTIVES
OBSERVATION TECHNIQUES
OCCUPATIONAL SURVEYS
OCCUPATIONAL TESTS
OPEN BOOK TESTS
OPERATIONS RESEARCH
ORTHOGONAL ROTATION
ORTHOGRAPHIC PROJECTION
ORTHOGRAPHIC SYMBOLS
OUTCOMES OF EDUCATION

TESTS, MEASUREMENT, AND EVALUATION

APPLICABLE TERMS

TM

PASS FAIL
PASS FAIL GRADING
PATH ANALYSIS
PATTERN RECOGNITION
PEER EVALUATION
PERCEPTION TESTS
PERCEPTUAL DEVELOPMENT
PERFORMANCE
PERFORMANCE FACTORS
PERFORMANCE TESTS
PERSONALITY ASSESSMENT
PERSONALITY MEASURES
PERSONNEL EVALUATION
PERSONNEL SELECTION
PHONEME GRAPHEME CORRESPONDENCE
PIAGETIAN THEORY
POSTTESTS
PREDICTION
PREDICTIVE
PREDICTIVE MEASUREMENT
PREDICTIVE VALIDITY
PREDICTOR
PREDICTOR VARIABLES
PRESCHOOL EVALUATION
PRESCHOOL TESTS
PRETESTING
PRETESTS
PRETESTS POSTTESTS
PROBABILITY
PROBLEM SETS
PROCESSES
PROFICIENCY
PROFILES
PROGNOSTIC TESTS
PROGRAM EVALUATION
PROGRAM IMPLEMENTATION
PROGRAM IMPROVEMENT
PROGRAM VALIDATION
PROJECTIVE MEASURES
PROMPTING
PROTOCOL ANALYSIS
PSYCHOLOGICAL CHARACTERISTICS
PSYCHOLOGICAL TESTING
PSYCHOMETRICS
PSYCHOMOTOR SKILLS

Q METHODOLOGY
QUALIFICATIONS
QUALITATIVE
QUALITATIVE RESEARCH
QUALITY CIRCLES
QUASIEXPERIMENTAL
QUESTIONING
QUESTIONING TECHNIQUES
QUESTIONNAIRES

RACIAL BIAS
RATING
RATING SCALES
RAW SCORES
READABILITY
READABILITY FORMULAS
READING ACHIEVEMENT
READING RATE
READING TESTS
REGRESSION (STATISTICS)
REGRESSION ANALYSIS
RELIABILITY
REPORT CARDS
RESEARCH
RESEARCH ADMINISTRATION
RESEARCH ASSISTANTS
RESEARCH DESIGN
RESEARCH METHODOLOGY
RESEARCH NEEDS
RESEARCH PROBLEMS
RESEARCH PROJECTS
RESEARCH PROPOSALS
RESEARCH REPORTS
RESEARCH SKILLS
RESEARCH TOOLS
RESEARCH UTILIZATION
RESEARCH AND DEVELOPMENT
RESEARCHERS
RESPONSE RATES (QUESTIONNAIRES)
RESPONSE STYLE (TESTS)
RESPONSES
REVIEW (REEXAMINATION)

SAMPLE SIZE
SAMPLING
SCALES
SCALING
SCHEMA
SCHOOL ATTITUDES
SCHOOL READINESS TESTS
SCHOOL STATISTICS
SCHOOL SURVEYS
SCIENCE TESTS
SCIENTIFIC CONCEPTS
SCIENTIFIC LITERACY
SCIENTIFIC METHODOLOGY
SCIENTIFIC RESEARCH
SCORES
SCORING
SCORING FORMULAS
SCORING MACHINES
SCREENING
SCREENING TESTS
SELECTION (STUDENTS)
SELECTIVE
SELECTIVE ADMISSION
SELF CONCEPT
SELF CONCEPT MEASURES
SELF ESTEEM
SELF EVALUATION
SELF EVALUATION (GROUPS)
SELF EVALUATION (INDIVIDUALS)
SEMANTIC DIFFERENTIAL
SET THEORY
SEX BIAS
SEX DIFFERENCES
SEX FAIRNESS
SHORT TERM MEMORY
SIGNIFICANCE
SITE ANALYSIS
SITUATIONAL TESTS
SKILL ANALYSIS
SOCIAL ADJUSTMENT
SOCIAL ATTITUDES
SOCIAL BIAS
SOCIOMETRIC TECHNIQUES
SPATIAL ABILITY
STANDARDIZED TESTS
STANDARDS
STATE LICENSING BOARDS
STATE NORMS
STATE STANDARDS
STATE SURVEYS
STATISTICAL
STATISTICAL ANALYSIS
STATISTICAL BIAS
STATISTICAL DATA
STATISTICAL DISTRIBUTIONS
STATISTICAL INFERENCE
STATISTICAL SIGNIFICANCE
STATISTICAL STUDIES
STATISTICAL SURVEYS
STATISTICS
STUDENT ATTITUDES
STUDENT CERTIFICATION
STUDENT EDUCATIONAL OBJECTIVES
STUDENT EVALUATION
STUDENT EVALUATION OF TEACHER PERFORMANCE
STUDENT RECORDS
STUDENT TEACHER ATTITUDES
STYLE (TESTS)
SUMMATIVE
SUMMATIVE EVALUATION
SURVEYS
SYSTEMS ANALYSIS

TABLES (DATA)
TASK ANALYSIS
TEACHER CERTIFICATION
TEACHER EVALUATION
TEACHER MADE TESTS
TEACHER PERFORMANCE
TEACHER QUALIFICATIONS
TELEPHONE SURVEYS
TEST
TEST ANXIETY
TEST BIAS
TEST COACHING
TEST CONSTRUCTION
TEST FORMAT
TEST INTERPRETATION
TEST ITEMS
TEST LENGTH
TEST MANUALS

TM

TESTS, MEASUREMENT, AND EVALUATION

APPLICABLE TERMS

TEST NORMS
TEST RELIABILITY
TEST RESULTS
TEST REVIEWS
TEST SCORE DECLINE
TEST SCORING MACHINES
TEST SELECTION
TEST THEORY
TEST USE
TEST VALIDITY
TEST WISENESS
TESTING
TESTING PROBLEMS
TESTING PROGRAMS
TESTS
TEXTBOOK BIAS
TEXTBOOK EVALUATION
TEXTBOOK RESEARCH
THINKING
TIMED TESTS
TRAINING OBJECTIVES
TRAIT THEORY
TRANSFER OF LEARNING
TREND ANALYSIS
TRENDS
TRUE SCORES

VALIDITY
VALUE JUDGMENT
VERBAL ABILITY
VERBAL TESTS
VOCATIONAL EVALUATION

WEIGHTED SCORES
WORK SAMPLE TESTS
WRITING EVALUATION

URBAN EDUCATION (UD)

SCOPE OF INTEREST STATEMENT

I. FORMAL STATEMENT

Elementary and secondary education of the diverse populations in urban (and suburban) schools in the United States (and other countries), examined from the following four general perspectives:

- The social, psychological, economic, and educational characteristics of these populations;
- Educational programs, practices, and policies in urban schools serving these populations;
- The relationship of urban schools to other societal segments, organizations, or institutions in the urban community;
- The social and economic conditions affecting the development and education of these diverse urban populations.

A. Diverse Urban School Populations

Of interest is the education of urban children and youth, particularly those who are underserved or educationally at-risk because of their race or ethnicity, culture, social class, language background, or community characteristics. The populations predominantly of interest include, but are not limited to:

- African-Americans;
- Hispanic/Latino-Americans, excluding Mexican-Americans (see RC), but including other Central American and South American Spanish-speaking populations;
- Asian-American and Pacific Islanders;
- Immigrants and refugees, including those from Southeast Asia and other Asian nations, the Middle East, Central and South America, and Europe;
- Ethnic Americans of European descent (e.g., Italian-Americans, Polish-Americans, and so forth);

The distinct characteristics of these populations as learners are of interest and the programs, practices, and policies for their equitable treatment in schools.

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B. Educational Programs and Practices in Urban Schools

Of interest is the curriculum and instruction of these diverse urban populations and the organization of the schools in which they are predominant. For example, such issues as:

- Policies designed to reform and restructure individual urban schools or school districts and to improve the educational success of these populations, including, but not limited to desegregation, choice plans, magnet schooling, accelerated schooling, and so forth.
- Instructional strategies and classroom organizations to increase the academic achievement of these populations.
- Programs specifically designed to develop or improve the academic and vocational preparation, motivation, and self-concept of these diverse populations, including, but not limited to: compensatory education; programs for limited English-speaking students; sex equity programs; dropout prevention; and pregnancy prevention programs.
- Programs, practices, and policies to reduce prejudice, discrimination, and inequities in opportunities or resources in curriculum and instruction, testing and assessment, classroom organization, school financing, and so forth.

C. Urban Schools Relationship to the Urban Community

Of interest are the ways in which urban schools work with other segments of the urban community to create school-community relationships and partnerships that enhance urban education. These institutions include business and industry, local and national community organizations and groups, social service organizations, foundations, and so forth.

D. Social and Economic Conditions in Urban Areas

Of interest are the conditions affecting the education of these diverse populations that lie within the family (e.g., homelessness, one-parent families, family mobility, family life); within the community (e.g., housing, neighborhood organization); and within the larger society (e.g., poverty, employment). Also of concern are federal, state, local and private sector policies for improving these conditions, as they affect the education of these diverse populations.

II. EXPLANATORY NOTES

None.

III. BRIEF STATEMENT

The educational characteristics and experiences of the diverse racial, ethnic, social class, and linguistic, populations in urban (and suburban) schools in the United States (and other countries). Curriculum and instruction of students from these populations and the organization of the classrooms and schools in which they predominate. The relationship of urban schools to their communities, with emphasis on the ways that national and local institutions can collaborate with schools to enhance education. The social and economic conditions that affect the education of urban populations, with particular attention to factors that can place urban students at risk educationally, and ways that public and private sector policies can improve these conditions.

URBAN EDUCATION
APPLICABLE TERMS

UD

ABILITY GROUPING
ACADEMIC ACHIEVEMENT
ACADEMIC ASPIRATION
ACADEMIC FAILURE
ACADEMIC PERFORMANCE
ACCELERATED SCHOOLS MOVEMENT
ACCESS TO EDUCATION
ACCESS TO HEALTH CARE
ACQUIRED IMMUNE DEFICIENCY SYNDROME
ACTIVISM
ADJUSTMENT (TO ENVIRONMENT)
ADMINISTRATOR ATTITUDES
AFFIRMATIVE ACTION
AFRICAN AMERICAN STUDIES
AFRICAN CULTURE
AFRICAN HISTORY
AFRICAN LANGUAGES
AFRICAN LITERATURE
AFRICAN STUDIES
ALCOHOL ABUSE
ASIAN AMERICAN ACHIEVEMENT
ASIAN AMERICAN ATTITUDES
ASIAN AMERICAN CHILDREN
ASIAN AMERICAN CULTURE
ASIAN AMERICAN EDUCATION
ASIAN AMERICAN EMPLOYMENT
ASIAN AMERICAN FAMILY
ASIAN AMERICAN HISTORY
ASIAN AMERICAN LEADERSHIP
ASIAN AMERICAN LITERATURE
ASIAN AMERICAN ORGANIZATIONS
ASIAN AMERICAN POPULATION TRENDS
ASIAN AMERICANS
ASIAN AMERICAN STEREOTYPES
ASIAN AMERICAN STUDENTS
ASIAN AMERICAN STUDIES
ASIAN AMERICAN YOUTH

BEHAVIOR CHANGE
BIAS
BILINGUAL EDUCATION PROGRAMS
BILINGUAL EDUCATION
BILINGUAL INSTRUCTIONAL MATERIALS
BILINGUALISM
BILINGUAL SCHOOLS
BILINGUAL STUDENTS
BILINGUAL TEACHERS
BILINGUAL TEACHER AIDES
BIRACIAL SCHOOLS
BLACK ACHIEVEMENT
BLACK ATTITUDES
BLACK BUSINESSES
BLACK COLLEGES
BLACK COMMUNITY
BLACK CULTURE
BLACK DIALECTS
BLACK EDUCATION
BLACK EMPLOYMENT
BLACK FAMILY
BLACK HISTORY
BLACK INFLUENCES
BLACK INSTITUTIONS
BLACK LEADERSHIP
BLACK LITERATURE
BLACK MOTHERS
BLACK ORGANIZATIONS
BLACK POPULATION TRENDS
BLACK POWER
BLACK STEREOTYPES
BLACK STUDENTS
BLACK STUDIES
BLACK TEACHERS
BLACK YOUTH
BUSING

CAMBODIAN
CAMBODIANS
CHANGING ATTITUDES
CHILD DEVELOPMENT
CHILD LABOR
CHINESE AMERICANS
CHINESE CULTURE
CIVIL LIBERTIES
CIVIL RIGHTS
CIVIL RIGHTS LEGISLATION
CLASSROOM DESEGREGATION
CLASSROOM ENVIRONMENT
COGNITIVE ABILITY
COGNITIVE DEVELOPMENT
COLLEGE DESEGREGATION
COLLEGE SEGREGATION
COMMUNITY ATTITUDES
COMMUNITY CONTROL
COMMUNITY HEALTH SERVICES
COMMUNITY RELATIONS
COMMUNITY RELATIONS
COMPENSATORY EDUCATION
COMPENSATORY EDUCATION PROGRAMS
CORRECTIONAL INSTITUTIONS
COURT LITIGATION
CRIME PREVENTION
CROSS CULTURAL STUDIES
CROSS CULTURAL TRAINING
CROSS CULTURAL TRAINING
CUBANS
CULTURAL AWARENESS
CULTURAL BACKGROUND
CULTURAL DIFFERENCES
CULTURAL DISADVANTAGEMENT
CULTURAL EXCHANGE
CULTURAL INTERRELATIONSHIPS
CULTURAL ISOLATION
CULTURALLY DISADVANTAGED
CULTURAL OPPORTUNITIES
CULTURAL PLURALISM
CULTURAL TRAITS
CULTURE CONFLICT
CULTURE FAIR TESTS
CULTURE LAG
CURRICULUM DEVELOPMENT
CURRICULUM IMBALANCE
CURRICULUM PLANNING

DE FACTO SEGREGATION
DE JURE SEGREGATION
DECENTRALIZATION
DELINQUENCY
DELINQUENCY PREVENTION
DELINQUENT REHABILITATION
DEMOGRAPHY
DEPRESSED AREAS (GEOGRAPHIC)
DESEGREGATION
DESEGREGATION EFFECTS
DESEGREGATION LITIGATION
DESEGREGATION METHODS
DESEGREGATION PLANS
DEVELOPING NATIONS
DISADVANTAGED ADULTS
DISADVANTAGED GROUPS
DISADVANTAGED SCHOOLS
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URBAN EDUCATION

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URBAN EDUCATION
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ERIC ADJUNCT CLEARINGHOUSES

AR ADJUNCT ERIC CLEARINGHOUSE ON ART EDUCATION

Visual arts education, including painting, sculpture, and aesthetics.

CO ADJUNCT ERIC CLEARINGHOUSE ON COMPENSATORY EDUCATION (CHAPTER 1)

Compensatory education is education that seeks to compensate for environmental and experiential deficits in relation to such areas as schooling, housing, employment, poverty, racism, and other social and cultural factors.

"Chapter 1" refers to Chapter 1 of the Education Consolidation and Improvement Act (1981) that funds various compensatory education programs.

JS ADJUNCT ERIC CLEARINGHOUSE FOR U.S. - JAPAN STUDIES

U.S.-Japan relationships; the Japanese educational system; Japanese culture, society, economics, and politics, as it may be of interest to American educators, curriculum planners, and classroom teachers.

LE ERIC CLEARINGHOUSE ON LITERACY EDUCATION FOR LIMITED-ENGLISH-PROFICIENT ADULTS AND OUT-OF-SCHOOL YOUTH

Literacy education for limited-English-proficient (LEP) adults and out-of-school youth. Program design, curriculum development, materials adaptation, diagnosis and assessment, and training of trainers for volunteer tutors and others responsible for delivering literacy services to these groups. Reaching and keeping students in LEP adult literacy programs. Approaches to teaching literacy to LEP adults. Selecting and adapting materials for use in adult LEP literacy programs. Cultural considerations in teaching literacy to LEP adults. Literacy programs for LEP out-of-school youth. Training literacy volunteers and tutors. The role of first language literacy in the acquisition of second language literacy.

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Appendix B

Document Preparation (For Filming)

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

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I. GENERAL

The technical report or "fugitive" literature collected by ERIC is produced using a wide variety of printing techniques, many formats, and variable degrees of quality control. The producer of the document may be an individual working with minimal technical support or may be a large organization with access to both editors and graphic artists. Since the documents processed by ERIC go on to be microfilmed and reproduced in microfiche and paper copy for sale to users, it is essential that the ERIC document processor prepare the document in such a way that a reproduced copy of it is a readable and saleable product.

During selection, many conditions arise (see **Section III.E**) that can affect the decision to accession a document or not. However, it is usually during actual processing that any needed remedial document preparation action occurs.

The kinds of problems requiring document preparation for filming may be divided into three categories:

- Physical problems with the pages or sections of the document (e.g., missing pages, oversize pages, etc.);
- Legibility or reproducibility problems with the type, inks, papers, figures, etc.;
- "Technical" problems having to do, for example, with the availability of information external to the document, copyrighted segments of documents, requests to change documents, etc.

In addressing these problems, the ERIC document processors should keep in mind that the documents will be filmed and sold to users as copies of exactly what leaves their hands. If problem situations cannot be fixed, the user should be warned in the cataloging that they exist. While pagination (of all Level 1 and 2 documents) is a centralized ERIC Facility function, the paginator assumes that the document has been made ready by the Clearinghouses for page numbering. If problems with a document prevent pagination from being done, the document will be removed from RIE input and returned to the submitting Clearinghouse, with recommendations for any necessary remedial action.

Always submit an original copy of a document if it is available. EDRS should always receive the best copy available (i.e., the original) for filming and not a copy that is one generation removed from the original. Make a copy for Clearinghouse retention, if necessary, but keep the copy and submit the original, not vice versa.

Except for accession numbers, avoid marking a document with a Clearinghouse date stamp, processing assignments, Post-Its (that may inadvertently not be removed), and other administrative notes. It is best to leave the document as much as possible as it was created by the author or source organization. There are many reasons for this: it can be difficult to distinguish between original information and information added later; added information can "bleed" through or otherwise obscure original information; added information can raise unnecessary questions by later users. Administrative markings are best restricted to attached full-size processing sheets that are removed later before submission or before filming.

At EDRS, a document is reduced to a series of loose pages that can be individually run through, and turned over if necessary, in a high speed step-and-repeat automatic camera. Easily removed bindings (e.g., metal fasteners, plastic spirals, etc.) are discarded; permanent bindings are "guillotined" with a large power papercutter. EDRS filming is a production operation. By the time a document gets to EDRS, all the problems should have been resolved, either by the Clearinghouses or the Facility. The camera operator assumes that the document is complete and in proper sequence and does not review it on a page-by-page basis. With this context in mind, the inputting Clearinghouse always should try to submit a document that when reproduced via microfiche will be an accurate rendering of what the source intended and that will reflect favorably on ERIC as a conscientious, careful, and consistent processor of bibliographic entities, observing high standards of technical processing.

II. PHYSICAL PROBLEMS

A. Covers

1. Cover and Title Page Identical

If the Cover and Title Page are absolutely identical, there is no need for filming (and making the user pay for) a completely redundant page. However, if one does not completely subsume the other, then both should be left intact and filmed. Information (e.g., report numbers, organizational hierarchy, series information, disclaimers, dates, etc.) must never be lost through this process. *If in doubt, retain both pages.*

2. Window Covers

"Window" covers are covers having a hole in them through which the reader can read the document title appearing on a following title page. Window covers usually should be filmed because they often contain a variety of information about the issuing organization, all of which may not be repeated on the title page. However, if filmed as is, the "window" shows up simply as a hole without a title and the title does not appear on the first page the reader sees, where it is usually expected. The Clearinghouse should remedy this situation by filling in the empty window with the missing title. This is easily done by Xeroxing the title and taping it to show through the hole.

3. Vinyl/Pressboard Binders

Some documents come in three-hole vinyl binders or pressboard covers. These binders are generally larger than 8½" x 11" and rigid in shape. They cannot go through the automatic camera mechanism and must be removed before filming. This is best done at the Clearinghouse. If any information appears on the vinyl binder that does not appear elsewhere on the document, that information should be transferred to an inside page.

B. Pages

1. Missing Pages or Sections

Documents should be checked page-by-page to determine that all pages are present. This can be done by:

- accounting for all page numbers;
- checking against the Table of Contents;
- checking continuity from one page to the next, etc.
- checking for appended material referenced in the text.

It is not unusual for appendices and other material that should be at the back of the document to be missing.

Normally, missing pages must be replaced, either by obtaining a replacement copy of the document or by inserting the missing material. If, however, it is determined that the missing material may safely be left out (e.g., author's request, copyright restrictions, etc.), then the document processor should:

- insert into the document the following notice where the gap occurs:

> "Page(s) _____ was (were) missing (removed) from this document prior to its being submitted to the ERIC Document Reproduction Service (EDRS)."
>
> **OR**
>
> "Pages_____, containing "Maryland High School Reading Test" (1989), were removed from this document because of copyright prior to its being submitted to the ERIC Document Reproduction Service (EDRS)."

- mark the disclaimer label on the cover appropriately, indicating that the document was modified.
- insert into the Descriptive Note field an appropriate statement explaining the fact that material is missing and the reasons therefor.

2. **Out of Sequence Pages or Sections**

Checking for missing pages usually reveals any out of sequence pages. Such pages should be re-sequenced in the correct order.

3. **Duplicate Pages**

Checking for missing pages usually reveals any duplicate pages. Such pages should be removed.

4. Blank Pages

Blank pages, occurring *sporadically* in documents where the pages are routinely printed front and back, are not filmed (even if numbered in the original document). On each blank page, the Clearinghouse should prominently and in the middle of the page add the following legend in letters approximately one-quarter inch (¼") high:

```
BLANK PAGE
DO NOT FILM
```

In order to avoid bleedthrough, *do not use felt markers for adding this legend.* A rubber stamp or a sticker with the letters in a color other than black is recommended. Since this is a recurring operation, either of these techniques is preferred over hand lettering or marking, e.g., a large "X" on the page. This notice is for the benefit of the EDRS operator of the microfilming equipment.

NOTE: This instruction does *not* apply to documents that throughout their length are printed only on one side of the page. The page number stamping done by the Facility will suffice in such patterned cases to communicate filming instructions to EDRS.

5. Extraneous/Superfluous Pages

There are occasionally pages in a document that bear some small amount of printed material (e.g., a logo, heading, tab, etc.), but that are essentially blank. A judgment must be made as to whether the fragmentary information on the page is useful for the user, whether it may safely be ignored, or whether it can be simply moved to the next substantive page. Many of these pages are fly pages or act as separators for sections or parts of the document. If the material immediately following the separator also contains the heading or title, then the separator may be deleted without loss. Other common examples of extraneous pages are: (1) appended sets of overhead projection pages that duplicate pages already in the body of the document; (2) blank "scratch paper" pages in test booklets. If the document is printed front and back and the extraneous page has text on the other side, the processor may indicate that it is not to be filmed by following the instructions in II.B.4 above.

Extraneous pages of this type may be fairly numerous in curriculum guides and other such material and their removal may be consequential in lowering the price of the item.

Note that disclaimer statements by government agencies or other organizations, and pages containing author abstracts, are *not* to be considered superfluous.

6. Loose Pages

Documents receive considerable handling at the ERIC Facility and at EDRS. If documents are not bound, but consist of loose pages, there is danger that they will get out of sequence during processing. All documents consisting of loose pages (or having loose pages in an otherwise bound document) must be secured with a staple, metal fastener, rubber band, etc., to prevent their disarray or loss. Do ***not*** use regular (or butterfly) paper clips for this purpose, as they snag easily on other documents.

7. Wrong-Reading (i.e., "Landscape") Pages

It is ERIC's policy to film *all* pages in a "right-reading orientation, so that the user working on a microfiche reader need not turn their head or the platen to accommodate different page orientations.

Most documents are made up of normal or standard 8½" x 11" pages, with the text perpendicular to the long (11") dimension (see **Figure Appendix B-1**). Such a page occupies one microfiche frame when filmed in its normal right-reading orientation. Occasionally, however, entire documents or parts of documents are issued with the text in an "album" or "landscape" format, i.e., with the text parallel to the long dimension. Such a page would occupy one microfiche frame in a wrong-reading orientation, but two frames when placed in the required "right-reading" orientation.

Landscape pages are paginated by the Facility Paginator as two pages, i.e., two microfiche frames, and the page number is stamped so as to indicate to the EDRS camera operator the desired right-reading orientation.

In those relatively rare cases where the text on a landscape page is actually no wider than 8½", Clearinghouses should copy the page on an office copier to conform to a standard 8½" x 11" right-reading page. This procedure, when applied to a lengthy document of this type, can save many microfiche frames and significantly reduce the reproduced paper copy price for the user.

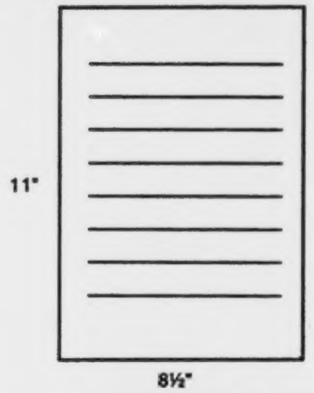
8. Oversize Pages and Foldouts

Oversize pages are defined as any page over 8½" in width or 11" in height. In order to be filmed, such pages must be converted to one or more "normal" 8½" x 11" pages or 11" x 8½" landscape pages. Various techniques can be used to accomplish this: (1) "reducing" office copiers; (2) trimming margins (often sufficient for "legal" size 11" x 14" pages); (3) cutting and remounting; (4) re-typing; (5) copying on office copiers as a series of overlapping 8½" x 11" pages.

Care must be taken in all cases not to lose text.

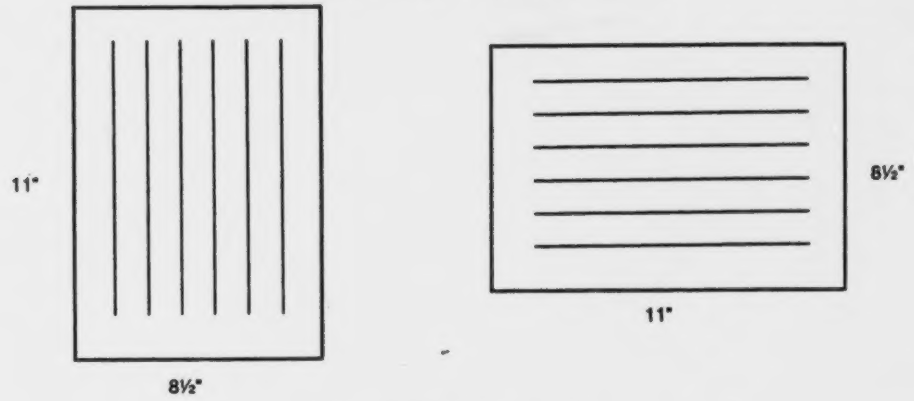
If an oversize poster or foldout cannot be converted successfully, then it should be deleted from the document and this deletion cited in the Note field, e.g., *"World population map, size 36" by 22," not included here."*

If a Clearinghouse cannot solve a particular oversize page problem, it should send in the oversize page with the document and ask the Facility to assist in solving the problem.



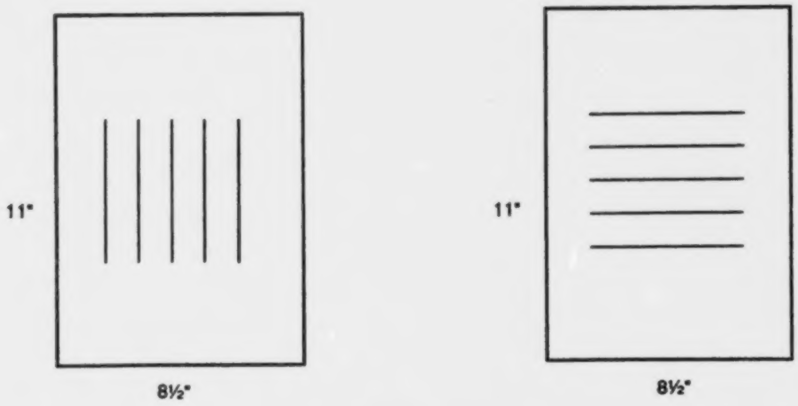
STANDARD PAGE

(= One Microfiche Frame in Right-Reading Orientation)



LANDSCAPE PAGE

= One Microfiche Frame in Wrong-Reading Orientation BUT = Two Microfiche Frames (= Two Pages) in Required Right-Reading Orientation



LANDSCAPE PAGE

Text no wider than 8½". Would be two microfiche frames if filmed as is, in right-reading orientation. BUT When converted to standard right-reading page on office copier, occupies only one microfiche frame.

Figure Appendix B-1: Landscape Pages

9. Undersize Pages

Undersize pages present no real filming problem but occasionally, if small enough, may present an opportunity for compression, e.g., if two small pages can be made to fit in the standard 8½" x 11" page space. Single undersize pages in an otherwise regular document should be converted to standard 8½" x 11" size to avoid their being overlooked in pagination or filming.

10. Multi-Piece Documents

Occasionally a single item submitted for the ERIC database consists of a number of distinct parts or pieces, e.g., a teachers guide, a student guide, handouts, activity sheet, pre-test/post-test, etc. In such cases, it is necessary to indicate clearly what the appropriate sequence of the pieces in the collection should be. Usually this will be the same as indicated in the table of contents, or other front matter. In order to help the Facility and EDRS retain the proper intended sequence for a multi-piece document, various techniques are possible: (1) lightly number the front of each piece, e.g., first piece=1, second piece=2, etc. (a light blue pencil is best); (2) place parts in the proper sequence and then bind together with metal clamp, rubber band, or other fastener. However, put the Clearinghouse accession number and ERIC labels *only* on the document's cover/lead page; do not repeat them on subsequent sections.

11. Attachments, Inserts, Supporting Documentation, Advertising, Reviews, Press/News Releases

If there is a physically separate attachment, insert, chart, poster, executive summary, news/press release, or other supplementary part, that appears to be or could be part of a document, or that a Clearinghouse wishes to include and make part of the document, it must be made completely clear whether the supplementary materials are to be considered part of the document for filming purposes, or whether they are simply being sent along for information purposes. If it is to be included, make the insertion in the *exact* place intended and affix it there so that the Facility paginator will know its intended location.

12. Non-Print Components

Some documents come with non-print components, e.g., films, filmstrips, audiotapes, videos, etc. At this time, ERIC does not have the capability to archive, duplicate, or disseminate such materials. In addition, many such items are protected by copyright.

In all such cases, the existence and availability of the non-print media should be noted in the resume (Availability or Note fields), but the non-print item should be retained by the Clearinghouse or disposed of prior to shipment to EDRS.

13. **Packets of Loose Material**

Some "documents" consist of a packet of loose material contained in a folder with one or two pockets. The folder and pockets may or may not display related text. It is the Clearinghouse's responsibility to put the loose material in the correct order and to secure it. The text on the folder/packets, if it is not duplicated elsewhere, must be converted to standard pages and placed in the desired sequence.

14. **Documents with Layered or "Staggered" Edges**

Some documents consist of complex arrangements of pages of different sizes, with header text usually showing on that part of a larger page that "peeks out" beyond a smaller page. It is the Clearinghouse's responsibility to convert complex "layer-cake" documents into a single series of regular 8½" x 11" pages that can each become a frame on a microfiche. This is usually best done by resorting to photocopying some, if not all, of the images.

15. **Extracts from Publications**

Some documents consist of portions of a larger publication, e.g., a chapter of a book, a feature article in a newsletter, or a supplement of a newspaper. In such cases, the Clearinghouse should separate the analyzed extract from its unwanted surrounding material and should send the extract through independently. It may be necessary in such instances to create a "title page" in order to have a location to cite the source of the extract. Enough documentation pertaining to the parent publication should accompany the submission so that the bibliographic facts in the case can be verified during editing.

16. **Analytics**

Sometimes a document may consist of a series of papers, chapters, or sections, each of which is worthy of separate treatment. An example is a conference proceedings volume containing a series of substantial, separately-authored papers on different subjects. The main document is usually referred to as the "parent" and the individual portions being separately analyzed and accorded individual treatment are called the "children," or, as librarians would say, the "analytics."

The parent document *as a whole* must be assigned the first accession number in the sequence, followed directly by each of the analytics, arranged in the same order as they are in the parent. This creates the ideal configuration for announcement in RIE and access via the microfiche collection.

The parent is submitted as one complete document. Each of the analytics is also submitted as a separate document, with its own Accession Number, title page, labels, etc. To accomplish this, it is necessary either to "cannibalize" a second copy of the entire document or to photocopy the pages for the analytics.

17. Errata

Errata are corrections to be made to a published text. The errors were discovered after the publication of the text and the errata sheets serve to notify the recipients of the text of the problem. Errata come in various forms. They may be printed on full-size sheets or they may be printed on strips of paper just large enough to hold them. They may be bound into the document at the front, at the back, or at the location of the error. They may be loose and simply inserted into the document.

When bound in, errata sheets are treated simply as another page at the location where bound in. Sometimes, when on narrow strips, they may be permanently affixed in open space on an existing page or to a margin in the vicinity of the error they correct.

When loose, the Clearinghouse must decide the best location for the errata sheets. If the errata treat errors at a single location, then the errata sheet should generally be inserted just preceding that location. If the errata treat errors at a number of different locations, then the errata sheet should generally be inserted at the front of the document (e.g., just after the Title Page is often a prominent enough location).

III. LEGIBILITY/REPRODUCIBILITY PROBLEMS

There are many factors that can cause legibility/reproducibility problems: type size, type style, dot matrix type, broken/faint/smudged type, colored papers and/or inks, translucent papers, photographs, drawings, handwriting, rumpled pages, poor contrast between background and type, toner smears, cropped pages, etc.

The available solutions are usually: (1) obtain a better copy (or replacement pages) from the source; (2) re-key; (3) darken on office copier; (4) note specific problems in resume (i.e., Note field) in order to alert potential users.

A. Type Size

In general, type size of 6-point or below causes reproduction problems and subsequent readability problems for the user. Office copiers with the "zoom" feature may be used to enlarge text that is excessively small. Re-keying may be an alternative if the amount of problem material is small.

B. Quality of Type (Broken/Faint/Smudged/Filled/Dot Matrix)

Broken type is the consistent dropping of portions of the characters (e.g., the left side, the descenders, the top, etc.), or the failure to create a complete uninterrupted line to represent the character (e.g., dot matrix type).

Faint or light type usually results from too little ink or toner at production time, or from too many generations of copying.

Smudged type occurs when the original characters are spread or dispersed around themselves, thereby confusing their identity.

Filled type occurs when the "holes" in certain letters (e.g., e, o, a, d) become filled with ink.

Unlike the small type problem, which is inherent with the original document, the various type quality problems may sometimes be solved by acquiring a better copy (even perhaps the original) from the author or source. Dot matrix type, formerly a major problem with computer-generated texts, is gradually giving way to the superior fonts produced by modern laser printers. If the author is told that the document will be archived on microfiche and reproduced for others, this will often motivate the author to produce a better copy.

If an improved copy cannot be obtained, remedial actions are generally limited to re-typing the affected text or hand re-touching the faulty characters. Sometimes broken characters can be made readable (and reproducible) by hand lettering the defective lines with a fine point pen. As with re-typing, re-touching is only feasible when the amount of defective material is modest in quantity.

Sometimes faint type can be improved significantly by using the "darkening" or exposure control feature on an office copier.

C. Colored Papers or Inks

Educational documents make frequent use of colored papers and/or inks. This can present a significant problem when the darker colors are used for the papers (e.g., red, purple, brown, etc.) or when the contrast between the paper and the ink is poor (e.g., yellow ink on beige paper).

Possible remedial actions are: (1) obtain a " plain" black and white copy from the source; (2) photocopy the colored pages with a sophisticated office copier that has exposure control settings permitting good black and white copies. Re-keying is rarely an option because when a document utilizes colored paper and/or inks it generally does so extensively.

Extensive tone-on-tone situations (e.g., red ink on red paper) may make a document virtually impossible to microfilm. However, many situations can be adjusted to by EDRS during the filming process. Clearinghouses should send in the best document for filming that they can obtain or improve on, but if still in doubt after having done all they can, the best rule is to submit the document (with a note explaining the circumstances) and let the Facility and EDRS cope with the problem.

A different type of problem occurs when colors are used as a coding technique in charts, tables, or bar graphs to convey meaning. Since the colors are lost in the filming process, the information contained in the original figure can only be retained if some symbol is used to substitute for the color. The document processor should consider different kinds of cross-hatching, arrows, patterns of special characters, and footnotes to achieve the end of preserving the information contained in the original text. If it is not possible to do this, a Note should notify the user of the problem.

D. Photographs

Photographs do not film or copy well unless very stark and simple in their content. There is nothing that the document processor can do to improve them; however, they are always better left in the document for the information they can convey. If a document depends heavily on photographs, it is advisable to state this fact in the Descriptive Note field, e.g., *"Contains 25 early photographs of American Indians, which will not reproduce well."*

E. Figures, Tables, Drawings, Illustrations

Figures, tables, drawings, and illustrations are frequent sources of reproduction difficulties and should be scrutinized by document processors with this in mind. Statistical tables and figures often are reduced excessively. Drawings and illustrations are often faint. The only possible remedial actions are usually enlarging, re-keying, or re-touching. If the problem is significant and cannot be ameliorated, a Note warning of the condition should be included in the resume.

F. Handwriting/Script in Documents

Handwritten text appears in documents in various ways. Sometimes it is in the form of author corrections or additions inserted for emphasis during presentation. Sometimes it is integral to the subject matter, e.g., factors affecting student handwriting. Script rarely reproduces well. If the script is in the form of corrections or additions to a typed or printed text, the document processor should consider re-keying to incorporate the corrections. If the script is integral to the document, but faint, the document processor should consider tracing over the lines to make them darker.

G. Miscellaneous

Pencil or pen markings that may have been inserted by an author, but that are not significant, should be erased or eliminated with correction fluid without affecting the text. Clearinghouse abstractors and indexers must avoid adding their own extraneous marks to documents they are processing.

Folded, rumpled or ripped pages should be flattened out as much as possible, or recopied on an office copier. Documents on "onionskin" or other semi-translucent papers should be copied on an office copier at an exposure setting that avoids any "see through."

Felt tip markers should never be used for darkening text or title page information as the ink may bleed through and obliterate the text on the other side.

Crooked pages, if badly awry, should be straightened so that they will create a proper filmed image. This can be done by photocopying or by cutting and re-mounting. If a crooked page results in the cropping of essential text, that page must be replaced before submission to the Facility for RIE.

IV. TECHNICAL PROBLEMS

A. Information Known, But Not on Document

In general cataloging should be done *solely* on the basis of what is contained in the document. However, during the course of acquiring a document or obtaining a Reproduction Release, the Clearinghouse may obtain reliable and verified information of use in cataloging that goes beyond what appears in the document, e.g., author's name and affiliation, institution name, date of issuance, geographic source, contract number, availability data, etc.

When practical, this information should be added to the Title Page. If there is no real Title Page, or the text begins on the first page and there is no room for additions, the Clearinghouse should consider the creation of a new Title Page to house the additional information.

If the new information is not added to the document, but is placed in the cataloging, then it is essential that an explanatory note accompany the document, so that the Facility editors can distinguish errors from valid additions.

B. Information Known, But at Variance with That on Document

If new information is discovered that corrects information on a document, then the document should actually be corrected. However, if the new information is in the form of an official "errata," then the errata page should simply be inserted directly after the Title Page. Obvious typographic errors in title, personal names, institution names, place names, etc., should simply be corrected on the document. Re-sequencing of author names should only be done upon receipt of a written request from the *first* author.

C. Inconsistent Information on Document

Sometimes information in one part of a document contradicts information in another part. If the correct version is not obvious, it may be necessary to contact the author or source. Information found in this way should be corrected on the document. If the contradiction cannot be resolved, the Title Page information takes precedence in cataloging.

D. Material Removed from Document

If a document being considered for the ERIC system contains materials that will not reproduce clearly because of either color or poor print quality, an attempt should be made to obtain a better copy. Usually the author or producer of the document prefers to furnish a reproducible copy rather than have an incomplete version available from ERIC.

In many instances the illegible parts are tables or charts that are referred to in the text. Omission of such segments may adversely affect the value of the document, thereby frustrating the user. *In general, material should not be deleted, despite poor legibility.*

In cases where a better copy of a document cannot be obtained and remedial actions are not possible, consideration should be given to omitting the document, unless it provides a valuable contribution to the literature, and the illegible material is considered to be minor.

E. Document with Copyrighted Segments Extracted from Other Publications

For the benefit of the user, documents should generally be left intact whenever possible. If the preparer of a document has obtained permission from a copyright holder to include copyrighted material in that document, then it is reasonable to assume that this permission extends to copies of the document. Therefore, if the preparer of a document has given ERIC permission to reproduce that document, then ERIC may assume that this permission includes all of the material in the document. Examples of documents for which this issue arises are curriculum materials that frequently reprint newspaper articles, newsletter columns, or extracts from journals. When this type of material is included in a document, it is to be considered an integral part of the document and left intact within it.

However, there are some instances where the above conditions may not pertain. If the copyrighted material is physically distinct, not bound in, is substantial in amount, contains strong restrictive language, is clearly a separately available commercial item, or any combination of the above, then the Clearinghouse processing the document should prudently seek separate reproduction permission for it. An example of such a situation would be a separate commercially-available testing instrument.

If reproduction permission for the separate segment cannot be obtained and it is still judged important to include the document in the database, this may be done, provided:

- the copyrighted segment is removed and excluded from the pagination count.
- the utility of the document is not seriously diminished by removal of the copyrighted pages.
- a note explaining the deletion is entered in the Note field. (A note should also be placed in the document at the point of deletion.)

F. Teacher Edition/Student Edition

Curriculum materials are sometimes provided in a "Teacher Edition" and a "Student Edition" that are identical except for the fact that the "Teacher Edition" contains marginal notes or advice not present in the "Student Edition."

In such cases, the more complete "Teacher Edition" should be input to the database, with reference made to the "Student Edition" not included. (If the documents are small, an acceptable alternative is to combine the two editions into one document.)

V. AFFIXING ERIC LABELS AND ACCESSION NUMBERS

A. Clearinghouse Accession Number

Clearinghouse Accession numbers are to be entered on the *lower left hand corner* of the cover (or first page to be filmed) of the document (see **Figure IV-12**). This placement balances the ED number and gives the document a neat appearance. The standardized positioning of the accession numbers is helpful throughout handling and processing for easily and quickly identifying and locating documents.

Accession Numbers should either be stamped or legibly printed using a black ballpoint pen. Pencil or colored inks should not be used because the former smears and the latter may not film or copy well. For documents having a permanent binding (which will be removed by a papercutter at EDRS), the Clearinghouse Accession Number should be placed at least ¼" from the edge of the spine to ensure it won't be cut off when the spine is trimmed. Legibility in the Clearinghouse Number is of importance to Clearinghouse staff, Facility staff, and EDRS staff, because:

- Accession Numbers on the document are checked against logsheets;
- Documents are filed at the Facility by Accession Number;
- Accession Numbers on documents are checked against and matched with those on resumes;
- Documents are arranged in Clearinghouse Number order prior to the attachment of Single Frame Resumes for EDRS.

If the title page or cover on which the number is to be placed is a dark color, the number should be first written on a white label and then placed on the document.

B. ED Accession Number

The ED Number is affixed by the ERIC Facility to the document in the *upper left hand corner* of the cover (or first page to be filmed). The upper left cover must, therefore, never be used for the disclaimer or reproduction release labels--that space must be reserved for the ED Number.

C. OERI Disclaimer Labels and Reproduction Release Labels

The Disclaimer Labels and Reproduction Release Labels (if appropriate), are to be affixed to the cover (or the first sheet to be filmed) of the document. These labels may be placed anywhere there is vacant space on this page, except for the *upper and lower left hand corners*, which are reserved for the ED and Clearinghouse Accession Numbers, respectively.

The labels should be placed in such a manner and location that they do not cover, even slightly, the text, title, author's name, etc. They may be trimmed down in order to fit; it is not recommended, however, that the labels be cut into parts. They especially should not be cut into parts and distributed perpendicularly to the text. If there is no space for the labels (for instance, when the document's first page is the first page to be filmed and is packed with text, or when the margins are narrow at both the top and bottom), the simplest and neatest thing to do is to type a new title page and to place labels there. Other than the "off limits" space in the left hand corners, labels may be placed anywhere, in any empty space on the title page, as long as they can fit without overlapping the text.

Labels, however, should never hang over the document's edge. Labels are to be placed entirely on the document--overhangs must be trimmed. Overhanging labels not only look carelessly applied, but more importantly, can be missed in the filming process. Overhanging labels can catch on surfaces of other documents and the document itself can be damaged. ERIC documents are handled numerous times at the Facility and at EDRS; protruding labels can get bent over, wrinkled, or torn off during processing. All labels should be straight, balanced, legibly annotated, and in the proper position.

VI. PHYSICALLY SECURING DOCUMENT

After a document has been prepared for filming and before it actually is packed with other documents for shipping to the Facility, it is necessary to ensure that the document will physically stay together.

If the document is bound already then there is no problem, but if the document is loose, or if it has parts that are loose, then one of the following methods of securing the document should be used:

- **Staples**

  Usually only viable for documents of under 50 pages. When using staples, please make sure that the staple goes through the document completely and that the last page is securely attached to the document by the staple.

- **Metal Clamps**

  An excellent way of securing loose documents. They are easily applied and provide a tight and secure bond, yet are easy to remove. Generally viable for documents in the 50-200 page range. EDRS especially likes metal clamps because they are easily removed for filming and re-affixed afterward to protect the document during storage.

- **Rubber Bands**

  If a document is very large and too unwieldy to staple or clamp, a protective back and front page should be added and the document secured with one or more rubber bands, as needed. The protective pages are needed because rubber bands can cut into pages at the edges.

Do *not* use paper clips or butterfly clips to secure documents, as they too easily become dislodged or snag on other documents, causing pages to become loose, out of sequence, or damaged.

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ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Appendix C:
ERIC Indexing Handbook
(Clearinghouse Indexing Practices)

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

ERIC

INDEXING HANDBOOK

(CLEARINGHOUSE INDEXING PRACTICES)

May 1989
(Revised -- June 1992)

Lynn Barnett & Jim Houston, Editors

ERIC Technical Steering Committee

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INDEXING: Why this handbook?

In a system like ERIC, it is sometimes difficult to know everything you need to know to operate as effectively as possible. Sometimes we just need a little extra information. This handbook is just that--extra information. It is designed to improve indexing and searching within the ERIC system. In no way is it intended to replace the *ERIC Processing Manual* (EPM), which contains detailed system rules for indexing. Neither does it contradict the EPM. Instead, this handbook recognizes that there are valid subject-area idiosyncracies that are not identified in the EPM or elsewhere; therefore it contains summaries of in-house, scope-specific indexing practices, Clearinghouse-by-Clearinghouse. It also contains a summary of important ERIC indexing reminders, based on comments and discussions at ERIC technical meetings.

This handbook recognizes that indexing and retrieval go hand-in-hand. Searchers should find it useful when searching subject areas that cross Clearinghouse scope areas.

It also recognizes that indexing is not an isolated task in a database like ERIC. For example, the assignment of Descriptors and Identifiers is closely related to the decision-making process in assigning Pubtype codes and Target Audiences. Regardless of which staff person is given the task (indexer, cataloger, supervisor) all three functions require an intellectual judgment about the nature of the document. Therefore this handbook includes guidelines for Pubtypes and Target Audience assignment as well as indexing guidelines.

The *ERIC Indexing Handbook* was prepared by and for ERIC staff, with input prepared by Clearinghouse indexing supervisors and compiled by the ERIC Technical Steering Committee. Routine updates are anticipated as Clearinghouses refine or expand their instructions for new indexers or as the system as a whole changes.

For further reference, see: *ERIC Processing Manual*; *ERIC Clearinghouse Scope of Interest Guide*; Introduction, published *Thesaurus of ERIC Descriptors* (Oryx Press).

May 1989

ERIC Technical Steering Committee
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Preface to the June 1992 Revision

This handbook was initially distributed at the May 1989 National Technical Meeting. At the time, the ERIC Technical Steering Committee planned to do a few minor corrections, then send the handbook to IR for Level-1 RIE processing. Somehow, this never got done. No one has said much about the product since 1989 and, until now, no action has been taken to put it into finished form. However, this is not to say that it was forgotten. From what I've seen and heard, ERIC indexers are using the product, and I have found it to be especially useful. For example, I have copied the *Indexing Reminders* section several times to use as a seminar/conference handout because it seems to illustrate more effectively than other available materials precisely what ERIC indexing is and how it really works. Nevertheless, questions have remained about getting the product into a more permanent form.

Since the original intent of the handbook was to supplement *Section VII "Indexing"* of the ERIC Processing Manual (EPM), the initial thinking was that maybe the two parts should be integrated. It soon became clear, however, that, in order to preserve the unique "pocket guide" character of the *Indexing Reminders* section and the helpful stand-alone qualities of the Clearinghouse sections, this should not be done. The fact that Clearinghouses prepared, and are individually responsible for, their own sections, made integration even more problematic.

The approach taken, therefore, was to attach the handbook essentially as is as an appendix of the EPM; the designation is EPM **Appendix C**. This preserves the integrity and usefulness of the original, permits continued maintenance and updating by the individual network components, and yet makes the handbook an integral part of the EPM (and its accompanying widespread circulation via EDRS or others).

I have made several changes to the *Indexing Reminders* section since the handbook was published in 1989. Textual changes are expressly marked with vertical lines. The Clearinghouse sections remain essentially the same as originally submitted (I did correct typos). It is hoped that Clearinghouses will provide the Facility with periodic updates to keep their individual sections complete and current.

June 1992

Jim Houston, Facility

CONTRIBUTORS

CH	Clearinghouse/Indexing Coordinators	Update
CE	Adult, Career, and Vocational Education Sandra Kerka	May 1989 (check list only)
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EC	Handicapped and Gifted Children Judi Conrad	May 1989
FL	Languages and Linguistics Darla Domke	May 1989
HE	Higher Education Lynn Barnett	May 1989
IR	Information Resources Barbara Minor	May 1989
JC	Junior Colleges Anita Colby	May 1989
PS	Elementary and Early Childhood Education Norma Howard	May 1989
RC	Rural Education and Small Schools Linda Miller	May 1989
SE	Science, Mathematics, and Environmental Education Bob Howe	not submitted
SO	Social Studies/Social Science Education Jane Henson	May 1989
SP	Teacher Education Mary Tregillus	May 1989
TM	Tests, Measurement, and Evaluation Ruth Christie	May 1989 (preliminary)
UD	Urban Education Wendy Schwartz	May 1989

INDEXING REMINDERS

THE BASICS

Relevance to user

Put yourself in the position of the user or searcher. Can the specific topic(s) covered be retrieved by your assigned index terms? Would you, in fact, want the item(s) retrieved by your index terms (especially, your major terms)?

How many terms?

Remember that the scope and breadth of the document/article in hand determines the number of index terms (Descriptors and Identifiers) to be assigned. The system averages are 10 for CIJE and 12 for RIE.

Majors

Major index terms represent the principal subjects of a document/article. They are preceded by an asterisk.

Every document/article in the database must have at least 1 major Descriptor.

★*Remember the "5/2, 6/1 maximum" rule: No more than 5 major Descriptors and 2 major Identifiers, or 6 major Descriptors and 1 major Identifier, are allowed. Under no circumstances are there more than a total of 7 majors on a single document/article. At no time is the number of major Descriptors to exceed 6, even if no major Identifiers are used.*

Before concluding your indexing, count your major terms (asterisks) so that you don't use too many.

Minors

Minor index terms are used for certain types of concepts, e.g., population, educational level, methodology, document form. They may also be used to index substantive concepts that are important to the document, but less important than the concepts represented by major Descriptors.

Avoid using minor terms to index every concept mentioned in the document, however briefly. This gives users false expectations.

Thesaurus/IAL authority

Always use the most current, complete editions of the *Thesaurus* and *Identifier Authority List* (working copies from the ERIC Facility), plus all supplements.

- Follow definitions and instructions in scope notes.
- Follow format exactly. If a Descriptor has a parenthetical qualifier, be sure to include it in your indexing.

  Example: RETENTION (PSYCHOLOGY)
- Don't index solely from the Thesaurus Rotated Display.
- Refer to the Hierarchical Display for all narrower Descriptors.
- Use Identifiers to index concepts that cannot be captured by Descriptors alone.

Translate the author's language into Thesaurus terms. Watch out for "tricks" that lead to word indexing.

Example: "older workers" may not conform to ERIC's scope note for OLDER ADULTS.

Keep your Thesaurus and IAL in a single notebook so you can refer to both at once.

Scope notes

Read scope notes (SNs). Scope notes may define a term more broadly or restrictively than everyday usage might suggest. Make sure to use Descriptors compatible with the document's meaning. Don't force the use of a Descriptor just because it looks like it means the same thing.

Example: SELECTIVE ADMISSION does not mean admission of highly competitive ("selected") students, but admission due to a variety of particular circumstances.

Cross-clearinghouse subjects

For indexing cross-scope documents, see other Clearinghouses' "indexing rules" provided in this handbook. Also refer to the Descriptors frequently used by the other Clearinghouses, listed in the *ERIC Clearinghouse Scope of Interest Guide*. Use RIE and CIJE to see how other Clearinghouses have indexed the same concept.

Don't be hesitant to call a colleague at another Clearinghouse for advice, particularly when a cross-scope Descriptor lacks a scope note.

Broad Descriptors

Be wary of very broad Descriptors (e.g., CURRICULUM) whose use may cause irrelevant retrieval. Especially avoid majoring them, unless as an absolute last resort when nothing else will do. (See discussion and list of "Excessively Broad Terms" in EPM Section VII.I.5.b.(3).)

Indexing up

Index only to the level of specificity of the document. Never "index up" to a broader term (BT) if a more specific Descriptor (NT) exists.

Examples:	Don't use DISABILITIES or VISUAL IMPAIRMENTS on a document about BLINDNESS.
	Don't use HISTORY when EDUCATIONAL HISTORY is clearly more appropriate. (Note: This type of error occurs when one indexes from memory, or otherwise fails to observe the hierarchical structure of the Thesaurus.)

For analytics, it is likely that BTs will be appropriate for the parent document and NTs for the children.

Leveling Descriptors

As a rule, use one of the mandatory educational level Descriptors on every document. Very few documents don't need one.

★*Assign "educational level" first, before doing your other indexing.*

Consider using an age level Descriptor when educational level is inappropriate.

Overindexing

Don't overindex. Be especially wary of the number of Descriptors assigned to short articles. Also be careful of using (esp., majoring) too many Descriptors beginning with the same word.

Identifiers

Use the author's terminology to construct new Identifiers, but conform to ERIC structure. Follow precedents already listed in the IAL.

Jot down your Clearinghouse's new Identifiers in your copy of the IAL, or key them weekly to a cumulative list.

Remind yourself of Identifier-to-Descriptor graduations by routinely "redlining" such terms in your IAL.

Title check

Always look at the document's title before concluding your indexing, to see if you've missed any significant obvious topic(s).

Index terms versus terms in the abstract

Descriptors must be in the ERIC Thesaurus. Identifiers must either be in the IAL or, if new, reflect the style of similar terms in the IAL (e.g., organization names, court cases, etc.).

★*When writing an abstract, don't "translate" the author's language into Descriptor terminology.* The abstract is reserved for the author's own words (the actual language of the document). This gives the searcher more options for finding a concept, especially something new that hasn't evolved yet into "educationese."

LEVELING: Mandatory Educational Level Descriptors

Optional Age Level Descriptors

Assignment/specificity

★Nearly all ERIC documents/articles require an educational level Descriptor. Assign it first, before other indexing is done.

Use the most specific educational level. (See **chart on page 8** for hierarchy of mandatory Educational Levels.)

Education levelers are often easily extrapolated from a document's content without being specifically mentioned.

Examples: "Grade 8 students" certainly gives the educational level away.

Students "from X school district" is an educational level clue.

If there is no educational level, try to use an age level Descriptor (see **chart on page 9**); however, do not exclude more specific age-related Descriptors.

Example: document on childhood cancer would be indexed with age leveler CHILDREN (minor Descriptor), as well as *CHILD HEALTH and *CANCER (major Descriptors).

Avoid indexing the generic terms CHILDREN and ADULTS when appropriate narrower terms are available, e.g., ADOPTED CHILDREN, ADULT DROPOUTS.

Majoring

Leveling Descriptors should normally be minor. Major only if the levels themselves are the subject, e.g., history of preschool education, old old drivers.

Preschool and K-12 reminders

More than one educational level Descriptor may be required to cover some grade levels.

Example: INTERMEDIATE GRADES and/or JUNIOR HIGH SCHOOLS to cover middle school populations.

Note: MIDDLE SCHOOLS is not an educational level Descriptor and cannot be used as an educational level substitute. If a document discusses "middle schools" and indicates the grades covered (typically 5th through 8th), then INTERMEDIATE GRADES and/or JUNIOR HIGH SCHOOLS should be indexed, since they are the most specific education levelers available. However, if the document discusses GRADES 5 or 6 or 7 or 8, or all four, but does not mention the concept MIDDLE SCHOOLS, then MIDDLE SCHOOLS should not be indexed.

Use education levelers and population Descriptors together for research using student populations as subjects.

Example: ELEMENTARY EDUCATION and ELEMENTARY SCHOOL STUDENTS.

When the topic is day care, use EARLY CHILDHOOD EDUCATION as the education leveler, unless the day care population is described more precisely, such as preschool age children---use PRESCHOOL EDUCATION leveling term.

If specific grades are covered in any depth, use the grade Descriptors as well as the appropriate educational level Descriptor(s).

Example: GRADE 10, GRADE 11, and HIGH SCHOOLS.

Postsecondary reminders

Use HIGHER EDUCATION for bachelor-degree (or higher) programs; use POSTSECONDARY EDUCATION for other post-high school programs.

Use HIGHER EDUCATION for all documents covering both two- and four-year colleges. Use HIGHER EDUCATION also for all four-year colleges and universities.

Use TWO YEAR COLLEGES for documents covering junior or community colleges, two-year technical institutes, and two-year branch university campuses. Use TWO YEAR COLLEGES also for associate-degree programs.

For documents dealing with transfer from two-year to four-year colleges, use HIGHER EDUCATION. TWO YEAR COLLEGES (or TWO YEAR COLLEGE STUDENTS), COLLEGE TRANSFER STUDENTS, TRANSFER PROGRAMS, etc., should also be used, as appropriate.

Use POSTSECONDARY EDUCATION for documents that include discussions of technical institutes or proprietary schools as well as two- or four-year colleges.

Use POSTSECONDARY EDUCATION for post-grade 12 trade schools.

Watch non-U.S. documents carefully to determine whether HIGHER EDUCATION or POSTSECONDARY EDUCATION is the appropriate leveler. For example, a foreign "college" is often not the equivalent of a U.S. degree-granting college.

College ↔ School interplay reminders

When the subject is (Desc) COLLEGE SCHOOL COOPERATION, then two education levelers are needed.

Examples: TWO YEAR COLLEGES and ELEMENTARY EDUCATION;

HIGHER EDUCATION and HIGH SCHOOLS;

HIGHER EDUCATION and ELEMENTARY SECONDARY EDUCATION (where one or more colleges are cooperating with all levels of a school district).

If the subject is (Desc's) COLLEGE APPLICANTS, COLLEGE ADMISSION, or COLLEGE ENTRANCE EXAMINATIONS, i.e., the population is high school students taking SATs, ACTs, applying for freshman admittance, etc., then both HIGH SCHOOLS and either HIGHER EDUCATION (4-year institutions) or TWO YEAR COLLEGES should be used.

Teacher Education reminders

Teacher education (or student teaching) materials generally require both the level of teacher preparation and the level for which the student is being prepared to teach.

Examples: HIGHER EDUCATION and ELEMENTARY EDUCATION to describe preservice preparation for elementary school teachers, including their student teaching experience.

HIGHER EDUCATION and SECONDARY EDUCATION to describe college-level professional continuing education programs for secondary school teachers.

Teacher education materials should also be indexed to PRESERVICE TEACHER EDUCATION or INSERVICE TEACHER EDUCATION, if either is at all relevant. The first example above would carry PRESERVICE TEACHER EDUCATION -- the second, INSERVICE TEACHER EDUCATION. (The broad Descriptor TEACHER EDUCATION is used only for broad-ranging discussions or if further specificity is not provided.)

ERIC MANDATORY "EDUCATIONAL LEVEL" DESCRIPTORS

(Procedure implemented February 1975)

● **EARLY CHILDHOOD EDUCATION**

Scope Note: Activities and/or experiences that are intended to effect developmental changes in children, from birth through the primary units of elementary school (grades K-3).

●● **PRESCHOOL EDUCATION**

Scope Note: Activities and/or experiences that are intended to effect developmental changes in children, from birth to entrance in kindergarten (or grade 1 when kindergarten is not attended).

●● **PRIMARY EDUCATION**

Scope Note: Education provided in kindergarten through grade 3.

● **ELEMENTARY SECONDARY EDUCATION**

Scope Note: Formal education provided in kindergarten or grade 1 through grade 12.

●● **ELEMENTARY EDUCATION**

Scope Note: Education provided in kindergarten or grade 1 through grade 6, 7, or 8.

●●● **ADULT BASIC EDUCATION**

Scope Note: Education provided for adults at the elementary level (through grade 8), usually with emphasis on communicative, computational, and social skills.

●●● **PRIMARY EDUCATION**

Scope Note: (See above.)

●●● **INTERMEDIATE GRADES**

Scope Note: Includes the middle and/or upper elementary grades, but usually 4, 5, and 6.

●● **SECONDARY EDUCATION**

Scope Note: Education provided in grade 7, 8, or 9 through grade 12.

●●● **JUNIOR HIGH SCHOOLS**

Scope Note: Providing formal education in grades 7, 8, and 9 – less commonly 7 and 8, or 8 and 9.

●●● **HIGH SCHOOLS** *(Changed from "Senior High Schools" in March 1980.)*

Scope Note: Providing formal education in grades 9 or 10 through 12.

●●● **HIGH SCHOOL EQUIVALENCY PROGRAMS**

Scope Note: Adult educational activities concerned with the preparation for and the taking of tests which lead to a high school equivalency certificate, e.g., General Educational Development program.

● **POSTSECONDARY EDUCATION**

Scope Note: All education beyond the secondary level – includes learning activities and experiences beyond the compulsory school attendance age, with the exception of adult basic education and high school equivalency programs. (Before APR75, restricted to "education beyond grade 12 and less than the baccalaureate level.")

●● **HIGHER EDUCATION**

Scope Note: All education beyond the secondary level leading to a formal degree.

●● **TWO YEAR COLLEGES** *(Changed from "Junior Colleges" in March 1980.)*

Scope Note: Public or private postsecondary institutions providing at least 2, but less than 4, years of academic and/or occupational education.

ERIC OPTIONAL "AGE LEVEL" DESCRIPTORS

NEONATES
Scope Note: Aged birth to approximately 1 month.

INFANTS
Scope Note: Aged birth to approximately 24 months.

YOUNG CHILDREN
Scope Note: Aged birth through approximately 8 years.

CHILDREN
Scope Note: Aged birth through approximately 12 years.

TODDLERS
Scope Note: Approximately 1-3 years of age.

PRESCHOOL CHILDREN
Scope Note: Approximately 2-5 years of age.

PREADOLESCENTS
Scope Note: Approximately 9-12 years of age.

ADOLESCENTS
Scope Note: Approximately 13-17 years of age.

YOUNG ADULTS
Scope Note: Approximately 18-30 years of age.

ADULTS
Scope Note: Approximately 18+ years of age.

ADULTS (30 TO 45)
Scope Note: Age group between "young adults" and "middle aged adults" --approximately 30-45.

MIDDLE AGED ADULTS
Scope Note: Approximately 45-64 years of age.

YOUNG OLD ADULTS
Scope Note: Approximately 65-75 years of age.

OLDER ADULTS
Scope Note: Approximately 65+ years of age.

OLD OLD ADULTS
Scope Note: Approximately 75+ years of age.

MAJORING

Purpose

Major index terms are used for pure subject content. Other content aspects (see "Things to avoid..." on next page) are assigned minor status. Major terms are identified by an asterisk (*Descriptor; *Identifier).

Only major terms are found in the printed subject indexes of RIE and CIJE.

Number

Each document/article must have at least 1 major Descriptor.

★No more than a total of 7 majors are allowed, counting Identifiers. Remember the 6/1 or 5/2 rule (6 major Descriptors and 1 major Identifier are allowed, or 5 Descriptors and 2 Identifiers).

Fewer majors are usually desirable for narrowly focused topics.

Always recount your majors (asterisks) to avoid using too many.

Summary

Major Descriptors should summarize the document/article.

Variety

Use variety. Be adventuresome! Avoid more than two major Descriptors beginning with the same word (important for manual searching).

Scope notes

Watch the Thesaurus scope notes for instructions. Some SNs say "Do not major unless subject of document."

Things to avoid majoring

Unless they are the subject of a document, avoid majoring:

- Very broad or general Descriptors (e.g., TEACHERS, MODELS, PROBLEMS) (Note: PROBLEMS should never be indexed, period)
- Educational level
- Age level
- Document form or type (e.g., LEADERS GUIDES, WORKBOOKS)
- Research methodology (e.g., COMPARATIVE ANALYSIS, GRADUATE SURVEYS)
- Population groups or research subjects
    - Ethnic groups (Note: Do not confuse the Descriptors ETHNIC GROUPS and MINORITY GROUPS -- see Thesaurus scope notes)
        - Race
        - Religion
        - Nationality
    - Personnel groups or occupation
    - Socioeconomic status
    - Intelligence or ability level
    - Physical/emotional characteristics
    - Sex (gender)

OVERINDEXING

Objective

Avoid overindexing (or underindexing). Index the document/article in hand. Don't make assumptions.

Consider only the most significant and essential concepts of a document/article.

Example:	If a "sex" Descriptor (e.g., SEX DIFFERENCES) is used, it's usually not necessary to also index to MALES and FEMALES.

Minor Descriptors

Avoid peripheral topics. Restrict yourself to important ideas even when using minor Descriptors; too many can be confusing. Indexing everything in a document, even if only briefly mentioned, will give a user false expectations of the document content. Too many terms will also cause false drops or hits in searching.

Number of Descriptors

It doesn't hurt to keep the document's length in mind when judging the appropriate number of Descriptors to assign.

Resumes with more than 20 index terms (Descriptors/Identifiers) should be given a second look.

BTs/NTs

Use the most specific Descriptors available -- never automatically index "up" to a higher or broader level Descriptor unless the broader term is equally the subject of the document.

Example:	Don't use LIBRARIES to index a document on PUBLIC LIBRARIES.

Sometimes, use of a BT together with several NTs is justified [ex: index to "fruit" (major) if the document is about apples, oranges, grapes, grapefruit, and kiwi (fruit), and also to each specific fruit name that is significantly covered].

Very broad Descriptors should be avoided where possible, especially as majors. (See discussion and list of "Excessively Broad Terms" in EPM Section VII.I.5.b.(3).)

Examples:	CURRICULUM, EVALUATION, READING, CHILDREN, LANGUAGES.

1009

Use Identifiers for additional/supplemental specificity, as appropriate.

Example:

- STEALING is the most specific available Descriptor for the Identifier SHOPLIFTING. If such an Identifier is majored, the corresponding Descriptor should usually be minored.

  DESC_STEALING
  IDEN_*SHOPLIFTING

Variant ethnic names may be indexed, provided they faithfully reflect the language of the document.

Examples:

- If African-Americans or Afro-Americans is used by an author, and this reflects the subject of a document, then AFRICAN AMERICANS or AFRO AMERICANS should be used as an Identifier supplemented by "Black" Descriptors, e.g.:

  DESC_Black Students; High Schools
  IDEN_African Americans

  If the words African-/Afro-Americans are not used by authors, neither should they be used by ERIC indexers/abstractors/catalogers to describe those authors' works.

- If Chicanos or Chicanas is used in the document, use CHICANOS or CHICANAS (or a derivative thereof) as an Identifier and a "Mexican American" Descriptor, e.g.:

  DESC_Mexican Americans; Females
  IDEN_Chicanas

  DESC_Mexican American Education
  IDEN_Chicano Arts; Chicano Studies

- Similarly, if an author prefers Native Americans to American Indians, then NATIVE AMERICANS (or a derivative) should be an Identifier supplemented by one or more "American Indian" Descriptors. (See the discussion focused on American Indian Identifiers in EPM Section VIII, Part 2.)

METHODOLOGY

Method

Assign methodology Descriptors if a substantial discussion of the method is included, but not if it is simply stated that a particular method is used.

Examples: CORRELATION, COHORT ANALYSIS, MULTIVARIATE ANALYSIS, COMPARATIVE ANALYSIS, TREND ANALYSIS, QUESTIONNAIRES

Questionnaires

Use the minor Descriptor QUESTIONNAIRES and the Pubtype code 160 on all documents that include the actual questionnaire. (See next section, PUBTYPE, for further information.)

Type of study

When indexing research documents, include a Descriptor (minor) describing the type of study.

Examples: CASE STUDIES, FIELD STUDIES, CROSS SECTIONAL STUDIES, ETHNOGRAPHY, LONGITUDINAL STUDIES, NATIONAL SURVEYS, STATE SURVEYS, SCHOOL SURVEYS, FOLLOWUP STUDIES.

If a document talks in detail about how to conduct these studies, major the Descriptor(s).

Surveys

Avoid use of the broad term SURVEYS when an appropriate NT is available, e.g., NATIONAL SURVEYS, STATE SURVEYS, GRADUATE SURVEYS.

"Research" Descriptors

"Research" Descriptors and Identifiers such as READING RESEARCH, COMMUNICATION RESEARCH, and LEGAL RESEARCH may be generally avoided in indexing (especially as majors), since the Publication Type usually captures the concepts (e.g., PUBTYPE_143), unless, of course, "Research" is the subject of the document. See next section for Pubtype reminders.

PUBTYPE

Cataloging data field

Publication/Document Type (PUBTYPE_) is a separate field from the Descriptor and Identifier fields in an ERIC document or journal article resume. See **chart on page 18** for all ERIC Publication Types and their codes.

How many?

Every document must have at least 1 Pubtype code assigned.

Up to 3 Pubtype codes may be assigned. (CIJE articles are given no more than 2 since Pubtype 080 is assigned automatically by the computer.)

Most documents can be described adequately with 1 or 2 Pubtype codes.

Cross-reference chart

Refer to the cross-reference chart (3 pages, beginning on **page 19**) if you are unsure about which Pubtype to assign.

"Empty containers"

Some Pubtypes are pure forms or "empty containers" (i.e., 010=books, 080=journal articles, 150=speeches/conference papers), and an additional more specific Pubtype may be appropriate.

Example: a journal article (080) may be also a state-of-the-art study (070).

"ERIC publications" (Pubtype 071), while not quite so "empty," is vague enough to warrant an additional Pubtype assignment in most instances.

1012

Clarifying specificity

Pubtype codes on a document/article may be supplemented by Descriptors.

Use a specific Descriptor (usually minor) to clarify a Pubtype when appropriate.

Examples: 160 and QUESTIONNAIRES when the actual questionnaire/survey form is included.

160 and a "Tests" term [see MEASURES (INDIVIDUALS) hierarchy] when the actual test instrument is included.

143 and a "study" or "research" term (e.g., CASE STUDIES, FIELD STUDIES, LANGUAGE RESEARCH).

120 and POSITION PAPERS.

090 and HEARINGS and the appropriate Congress session Identifier (e.g., CONGRESS 102ND), on all texts of Congressional hearings.

090 and COURT LITIGATION (major) on summaries or guides about school law cases; also, 120 on review articles about those cases.

110 and 143, as well as appropriate "survey" and/or "statistics" Descriptors, for statistical surveys that include a narrative report.

GUIDES=050, 051, 052, or 055 (educational practitioner materials) and a minor Descriptor to describe the type of guide, e.g., GUIDELINES, LESSON PLANS, STATE CURRICULUM GUIDES, RESOURCE MATERIALS, UNITS OF STUDY, INSTRUCTIONAL MATERIALS, TEXTBOOKS, WORKBOOKS, FACULTY HANDBOOKS, LABORATORY MANUALS, STUDY GUIDES, TEST MANUALS.

"Exact match" Descriptors

Remember that you can't use certain Descriptors that exactly match a Pubtype name (e.g., BOOKS and 010), unless they reflect subject matter. Each carries the following note in the Thesaurus: "Corresponds to Pubtype xxx -- do not use except as the subject of a document."

See the **chart at the bottom of page 21** for exact match Descriptors and Pubtype codes.

Pubtype 120 – Viewpoints

Pubtype 120 often serves as a catch-all. Be sure it's the most appropriate code to use.

Pubtype 140 group – Reports

Pubtypes 141, 142, and 143 should usually (but not always) be used independently of each other.

CODE*	PUBLICATION/DOCUMENT TYPES
010	BOOKS
	COLLECTED WORKS
020	---General
021	---Conference Proceedings
022	---Serials
030	CREATIVE WORKS (Literature, Drama, Fine Arts)
	DISSERTATIONS/THESES
040	---Undetermined
041	---Doctoral Dissertations
042	---Masters Theses
043	---Practicum Papers
	GUIDES
050	---General (use more specific code, if possible)
	---Classroom Use
051	---Instructional Materials (For Learner)
052	---Teaching Guides (For Teacher)
055	---Non-Classroom Use (For Administrative and Support Staff, and for Teachers, Parents, Clergy, Researchers, Counselors, etc., in Non-Classroom Situations)
060	HISTORICAL MATERIALS
070	INFORMATION ANALYSES (State-of-the-Art Papers, Research Summaries, Reviews of Literature on a Topic)
071	---ERIC Information Analysis Products (IAPs)
072	---Book/Product Reviews
073	---ERIC Digests (Selected) in Full Text
080	JOURNAL ARTICLES
090	LEGAL/LEGISLATIVE/REGULATORY MATERIALS
100	AUDIOVISUAL/NONPRINT MATERIALS
101	---Computer Programs
102	---Machine-Readable Data Files (MRDFs)
110	STATISTICAL DATA (Numerical, Quantitative, etc.)
120	VIEWPOINTS (Opinion Papers, Position Papers, Essays, etc.)
	REFERENCE MATERIALS
130	---General (use more specific code, if possible)
131	---Bibliographies/Annotated Bibliographies
132	---Directories/Catalogs
133	---Geographic Materials/Maps
134	---Vocabularies/Classifications/Dictionaries
	REPORTS
140	---General (use more specific code, if possible)
141	---Descriptive (i.e., Project Descriptions)
142	---Evaluative/Feasibility
143	---Research/Technical
150	SPEECHES, CONFERENCE PAPERS
160	TESTS, EVALUATION INSTRUMENTS
170	TRANSLATIONS
171	---Multilingual/Bilingual Materials

*Up to 3 codes for RIE, or 2 for CIJE, can be assigned to each document.

GUIDE FOR ASSIGNING PUBTYPE CODES (A CROSS-REFERENCE FROM SPECIFIC KINDS OF DOCUMENTS TO MOST APPLICABLE PUBLICATION TYPE CODE)

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Abstracts	131
Administrator Guides	055
Annotated Bibliographies	131
Annual Reports	141
Answer Keys	160
Answer Sheets	160
Anthologies	020
[Archival Documents]	060
Atlases	133
Audiodisks	100
Audiotape Recordings	100
★Audiovisual Aids	100
Autobiographies	060
★Bibliographies	131
[Bilingual Materials]	171
Biographical Inventories	060 (132)
Biographies	060
[Booklists]	131
★Books	010
Book Reviews	072
Bulletins	022
[Bylaws]	090
Cartoons	100 (030)
Case Records [or] Case Studies	141 or 143 or 140
Catalogs	132
Charts	100
Check Lists	130 or 160
[Childrens Books]	010 and 030
Childrens Literature	030 (010)
Chronicles	060 (020)
Citation Indexes	131
[Class Newspapers]	022
[Classroom Games]	051 (100)
[Classroom Materials]	051 or 052
Codes of Ethics	090
Comics (Publications)	030
Computer Output Microfilm	100
★Computer Software	101
Computer Software Reviews	072 (142)
[Concordances]	134
★Conference Papers	150
★Conference Proceedings	021

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
[Conference Summaries]	021
Contracts	090
Course Descriptions	052 or 050 or 051
[Courtroom Transcripts]	090
[Creative Works]	030
Curriculum Guides	052 or 050 or 051
[Data Sheets]	110 or 130
Databases	102
Diagrams	100
Diaries	120 (060 or 030)
★Dictionaries	134
[Dictionary Catalogs]	131
★Directories	132
[Discipline Codes]	090
Discographies	131
★Doctoral Dissertations	041
Documentaries	100 (141)
Drama	030
Editorials	120
Encyclopedias	130
[ERIC Digests in Full Text]	073
[ERIC IAPs]	071
Essays	120 or 030
[Evaluation Studies]	142
Facility Guidelines	055
Faculty Handbooks	055
Feasibility Studies	142
Filmographies	131
Films	100
Filmstrips	100
Flow Charts	100
Foreign Language Books	010 (170)
Foreign Language Films	100 (170)
Foreign Language Periodicals	022 (170)
Games	030 or 100
Glossaries	134
Graphs	100
Guidelines	050 or 052 or 055
★Guides	050 or 051 or 052 or 055

FOOTNOTES:

1. All terms not in brackets have been selected from the ERIC Thesaurus.
2. Conventions
   A or B = one or the other category is appropriate, depending on item.
   A and B = two categories are appropriate.
   A (B) = a second category might be appropriate, depending on item.
   ★ = category and term are synonymous. Term should be used in Descriptor field only when it denotes subject matter.
3. These terms, like all other Descriptors identifying the form or type of a document, should be used as major Descriptors only when they represent the subject of the document in hand.

Page 1 of 3

[Bracketed terms are not Descriptors]

GUIDE FOR ASSIGNING PUBTYPE CODES (A CROSS-REFERENCE FROM SPECIFIC KINDS OF DOCUMENTS TO MOST APPLICABLE PUBLICATION TYPE CODE)

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Hearings	090
[Historical Reviews]	060
Illustrations	100
Indexes	130 or 131
[Information Analyses]	070 or 071
Instructional Materials	051
Interviews	120 or 160
Item Banks	160
[Journal Articles]	080
[Journals]	022
[Judicial Materials]	090
Kinescope Recordings	100
Laboratory Manuals	051
[Language Guides]	051 or 030 (170)
Large Type Materials	051
Leaders Guides	052
[Lecture]	150 (051)
[Legal Analysis]	090
Legislation	090
Lesson Plans	052
Letters (Correspondence)	030
[Literature Guides]	131
Literature Reviews	131 (070)
[Lobbying Papers]	090 and 120
Magnetic Tape Cassettes	100
Magnetic Tapes	100
[Manuals]	050 or 051 or 052 or 055
Maps	133
Master Plans	090
[Master Tapes (Audio)]	100
★Masters Theses	042
Matrices	100
Microforms	100
Models	100 or 143
★Multilingual Materials	171
[Musical Materials]	030
Negotiation Agreements	090
Newsletters	022
Newspapers	022
Nonprint Media	100
Opinions	120
[Oral History Transcripts]	060

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Pamphlets	Document Dependent
[Parent Guides]	055
Patents	090
Periodicals	022
Permuted Indexes	130 or 131
Personal Narratives	060 or 120
[Phonograph Records]	100
Photographs	100
Poetry	030
Position Papers	120
★Practicum Papers	043
Program Descriptions	141
Program Evaluation	142
Program Guides	141
Program Proposals	141
[Programed Texts]	010 and 051
Puzzles	030 or 100
Questionnaires	160
Rating Scales	160
[Recommendations]	120
Records (Forms)	Document Dependent
★Reference Materials	130 (010)
[Regulations]	090
★Reports	140
[Research Methodology Guides]	055
Research Proposals	143
★Research Reports	143
[Research Reviews (Publications)]	070
Resource Materials	050 or 051 or 052 or 055
Scholarly Journals	022
School Newspapers	022
School Publications	Document Dependent
Scripts	030
★Serials	022
Short Stories	030
Slides	100
Specifications	090
★Speeches	150
Standards	090
State of the Art Reviews	070
★Statistical Data	110
Student Journals	120 (030)
Student Publications	Document Dependent
Study Guides	051

Page 2 of 3
(see explanatory footnotes on first page)

[Bracketed terms are not Descriptors]

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GUIDE FOR ASSIGNING PUBTYPE CODES (A CROSS-REFERENCE FROM SPECIFIC KINDS OF DOCUMENTS TO MOST APPLICABLE PUBLICATION TYPE CODE)

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
Surveys	160 or 143
Tables (Data)	110
Talking Books	100
Tape Recordings	100
[Taxonomy]	134
Teaching Guides	052
[Technical Reports]	143
Test Reviews	072 (142)
★Tests	160
Textbooks	010 and 051
Thesauri	134
★Theses	040

PUBLICATION TYPE	PUBTYPE CODE MOST APPLICABLE
[Transcripts (Interview)]	120
[Transcripts (Legal)]	090
[Transcripts (Oral History)]	060
Videodisks	100
Videotape Recordings	100
★Vocabulary	134
Word Lists	134
Workbooks	051
Worksheets	051
Yearbooks	141 (022)

Page 3 of 3
(see explanatory footnotes on first page)

[Bracketed terms are not Descriptors]

DESCRIPTORS CORRESPONDING TO PUBLICATION TYPE CATEGORIES

DESCRIPTOR	PUBTYPE CODE
AUDIOVISUAL AIDS	100
BIBLIOGRAPHIES	131
BOOKS	010
COMPUTER SOFTWARE	101
CONFERENCE PAPERS	150
CONFERENCE PROCEEDINGS	021
DICTIONARIES	134
DIRECTORIES	132
DOCTORAL DISSERTATIONS	041
GUIDES	050
MASTERS THESES	042
MULTILINGUAL MATERIALS	171
PRACTICUM PAPERS	043
REFERENCE MATERIALS	130
REPORTS	140
RESEARCH REPORTS	143
SERIALS	022
SPEECHES	150
STATISTICAL DATA	110
TESTS	160
THESES	040
VOCABULARY	134

TARGET AUDIENCE

Cataloging data field

Target Audience (AUD_), like PUBTYPE, is a separate field from the Descriptor and Identifier fields. See **chart on page 24** for ERIC's list of defined and permissible Target Audiences.

Number

Not every document is assigned a Target Audience. The system average is around 25%.

As many Target Audience designations as needed can be assigned to a single document, provided that the designated audience names and an overall space limitation of 80 characters are adhered to.

Assignment

Use Target Audience only if the document or article explicitly directs itself to an audience, e.g., "...intended for school teachers..." ★Don't guess who might want a document.

Assume that Target Audience implies restrictiveness, that its assignment excludes the document's relevance to other groups.

Journals

Don't automatically assign a particular Target Audience to all items from a given journal. Even if the journal is published by a research society, teacher association, administrator organization, etc., each article should be judged independently for Target Audience. Use of the Target Audience field is appropriate only if an article specifically mentions a particular audience. Otherwise, the field should be left blank.

Practitioners

Remember that "AUD_Practitioners" will be assigned automatically by the ERIC computer when any of the narrower practitioner sub-category terms (e.g., Teachers) are assigned. This is different from the way ERIC Descriptors work.

Researchers

"AUD_Researchers" should be used circumspectly; its use can be generally restricted to documents/articles that are so esoteric (technical) that they would be of little interest to other audiences.

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ERIC®

TARGET AUDIENCE

Educational documents and journal articles are sometimes written for particular audiences. ERIC currently identifies these audiences in a special "Target Audience" field (data element). The field is used when an author clearly specifies an intended audience; otherwise, it is left blank. For consistency, eleven (11) distinct audiences have been defined by ERIC, as follows:

- **Policymakers**
- **Researchers**
- **Practitioners***
    - **Administrators**
    - **Teachers**
    - **Counselors**
    - **Media Staff**
    - **Support Staff**
- **Students**
- **Parents**
- **Community**

**Note:* *The ERIC computer system automatically adds the generic audience 'Practitioners' to records cataloged by any of the five 'practitioner' sub-categories.*

IDENTIFIERS

Most important rules

1. **IAL.** Use the *Identifier Authority List*! Try every possible way to correlate a new concept with already existing terms.

2. **UFs.** Don't use Thesaurus UFs as Identifiers.

3. **Majors.** Maximum of 2 major Identifiers (with up to 5 major Descriptors), or only 1 if the maximum 6 major Descriptors are used.

4. **Format.**

   Use IAL precedents rather than creating or inventing unnecessary new Identifiers.

   When creating necessary new Identifiers, follow the IAL format for similar terms. Use the IAL Category Display to find parallel terms.

   Remember the 50-character limit (including spaces).

   No punctuation is allowed except left and right parentheses, not even apostrophes. Examples:

   ADAMS V RICHARDSON
   AMERICAS COMPETITIVE CHALLENGE
   BENNETT (WILLIAM J)

5. **Acronyms.** Acronyms are not allowed as a rule. Some exceptions: ERIC, UNESCO, USSR.

Potential Identifiers

★*Don't be reluctant to use Identifiers!* Always index the following when they are the subjects of documents/articles:

- Institution or association names (don't index them if they merely prepared the report, unless it is an official position paper or similar statement of the institution)

- School district names (use in lieu of public school names, unless the latter are particularly significant)

- College or university names

- Languages not in the Thesaurus
- Tribes
- Persons
- Laws (enacted, not proposed)
- Geographic regions
- Foreign country names (coordinated with the minor Descriptor FOREIGN COUNTRIES -- watch out for ERIC's idiosyncrasies for Canada and the U.K.)
- Test names
- Computers/computer programs
- Specific methods, theories, ideas, etc., not in the Thesaurus
- New terms in the discipline or field not yet in the Thesaurus

Country names

Use DESC_FOREIGN COUNTRIES (minor) and IDEN_name of the country (major or minor, followed by city or other geopolitical subdivision, if appropriate, in parentheses).

Refer to IAL for proper format.

Example: NORTH KOREA or SOUTH KOREA, not KOREA |

Use IDEN_UNITED STATES sparingly, usually for various subdivisions, e.g., UNITED STATES (SOUTH), or for overall comparisons with other countries. Otherwise, it is implied by its absence.

Identifiers for Canada and the U.K. name the province or state, e.g., ALBERTA (EDMONTON), ENGLAND (LONDON). Don't index CANADA or UNITED KINGDOM alone unless you really mean the entire country. Don't index GREAT BRITAIN unless you mean England, Scotland, and Wales, but not Northern Ireland.

Don't use AFRICA (continent) in lieu of more specific African countries.

Geographic attribution

Organization names are generally followed by U.S. state or Canadian province postal abbreviations, or by other country names in parentheses.

Examples:
AMERICAN UNIVERSITY OF BEIRUT (LEBANON)
HARVARD UNIVERSITY MA
UNIVERSITY OF VICTORIA BC

Note the Canadian abbreviations:

Alberta	AB
British Columbia	BC
Labrador	LB
Manitoba	MB
New Brunswick	NB
Newfoundland	NF
Northwest Territories	NT
Nova Scotia	NS
Ontario	ON
Prince Edward Island	PE
Quebec	PQ
Saskatchewan	SK
Yukon Territory	YT

United Kingdom organizations are followed by one of the four principal divisions, if appropriate, i.e., (ENGLAND), (SCOTLAND), (WALES), (NORTHERN IRELAND).

Avoid guesswork in selecting organizational geographic locations. While the locations of organizations/institutions are often not specifically stated, adequate clues usually exist in the document. All locations should be verified in one of the standard reference sources cited in EPM Section VIII, Part 2 (Category #17 discussion). If a location proposed by the indexer does not agree with that in the standard reference, it probably means that the proposed location is incorrect.

School System? or City?

If the focus of a document is on a particular public school system, use the school district name as an Identifier.

Example: NEW YORK CITY BOARD OF EDUCATION

If the focus is more on the school system's general locale, use the location itself as the Identifier.

Example: NEW YORK (NEW YORK)

Such Identifiers are majored when crucial to the content of the document.

Note: Names of specific public grade schools or high schools should not be indexed unless they're particularly outstanding; instead, index the school district's name.

Coordinate with Descriptors

To index a specific concept, both a Descriptor and an Identifier may be needed.

Example: DESC_GAMES (minor) and IDEN_*CARD GAMES

Collections of documents

Sometimes unique Identifiers are assigned to a collection of documents important to retrieve as a group.

Examples: AAUP CONTRACTS (major) -- for collective bargaining contracts collected for ERIC by the American Association of University Professors

NATIONAL DIFFUSION NETWORK PROGRAMS (minor) -- for descriptions of programs sponsored by NDN

Legislation

Use PROPOSED LEGISLATION for legislation that hasn't passed yet.

Use name and date for legislation that has passed.

Example: MISSING CHILDREN ACT 1982

Use public law numbers only as a last resort. The name is preferable.

Example: PUBLIC LAW 87 276

Include the number of the Congressional session on documents like House and Senate hearings.

Example: CONGRESS 102ND

MISCELLANEOUS

ERIC Digests

All ERIC Digests are indexed by the minor Descriptor "ERIC Digests" (and assigned Pubtype 071).

Foreign countries

Use FOREIGN COUNTRIES (Descriptor, minor) and the country name (Identifier, probably major) for documents about countries other than the U.S.

Qualify country names by parenthetical geographic subdivision if appropriate, e.g., MEXICO (MONTERREY). It is usually more appropriate to cover smaller, lesser-known geographic subdivisions in the abstract.

When a document is about DEVELOPING NATIONS (and/or, when non-U.S., DEVELOPED NATIONS), and uses this or synonymous terminology (e.g., "underdeveloped countries," "third world"), index with these Descriptors in addition to FOREIGN COUNTRIES.

The Descriptor FOREIGN COUNTRIES may be majored when it is the broad subject or when more than 2 country names are subject-indexed (i.e., more than the maximum 2 major Identifiers).

Public vs. private education

Assign "public" or "private" Descriptors (e.g., PUBLIC EDUCATION, PUBLIC SCHOOLS, PUBLIC COLLEGES, PRIVATE EDUCATION, PRIVATE SCHOOLS, PRIVATE COLLEGES) on appropriate documents. Don't assume that it is obvious to the user.

Languages

When indexing a language name, check first to see if it is a Thesaurus Descriptor, i.e., in the LANGUAGES hierarchy. Then, look under IAL category #13.

For new "language" Identifiers, call FL for advice, or use the following authorities:

> Classification and Index of the World's Languages
> by C.F. and F.M. Voegelin (Elsevier, 1977).
>
> Ethnologue (10th edition), by Wycliffe Bible Translators (1984).

Documents on specific modern languages other than English, French, German, Spanish, Italian, and Russian, are indexed with the Descriptor UNCOMMONLY TAUGHT LANGUAGES along with the specific language name(s).

Language vs. people

Distinguish between the name of a language and its speakers, and between speakers of a language and their geographic location.

Examples:
DESC_JAPANESE refers to the language
DESC_JAPANESE AMERICANS refers to Americans of Japanese origin
IDEN_JAPANESE PEOPLE is self-evident.

Foreign language speakers

If a document discusses speakers of languages other than English, use:

-- (Desc) SPANISH SPEAKING, (Iden) FRENCH SPEAKING, etc.,

OR

-- the specific language name itself (Desc or Iden -- whichever way it is in the Thesaurus or IAL),

OR

-- if the language is unspecified, (Desc) NON ENGLISH SPEAKING.

Of course, (Desc) ENGLISH, (Iden) ENGLISH SPEAKING, etc., are also indexed when they are the subjects of documents.

The concept of "non-English speakers enrolled in classes for the purpose of acquiring English" should be indexed by the Descriptor ENGLISH (SECOND LANGUAGE) in combination with SPANISH SPEAKING, NON ENGLISH SPEAKING, etc.

The Descriptor LIMITED ENGLISH SPEAKING should be used when that population is specifically discussed. Note that "Non English" and "Limited English" are different populations and should be so distinguished in indexing practice.

"Bilingual" population terms (i.e., BILINGUAL STUDENTS, BILINGUAL TEACHERS, BILINGUAL TEACHER AIDES) refer to those who know more than one language, not to those acquiring a second language through BILINGUAL EDUCATION or BILINGUAL EDUCATION PROGRAMS.

Foreign language documents

In the vast majority of foreign language documents, the language is not the subject but merely the vehicle of communication (e.g., a guide in Japanese on job safety). Therefore, do not use Descriptors in these cases to denote the language, but use the Language (LANG_) field.

In those rare cases where a foreign language document also has the language as its subject, appropriate language Descriptors may be used.

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
ADULT, CAREER, AND VOCATIONAL EDUCATION

Prepared by

Sandra Kerka

May 1989
(check list only)

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INDEXING CHECKLIST

1. Are all concepts in the title and/or abstract represented in the Descriptors (or Identifiers)?

2. Are Descriptors being used in accordance with their Scope Notes and Term Displays?

3. Is a mandatory educational level term assigned if appropriate? (See list on pages v-vi of Thesaurus Working Copy.) Is it the most specific level term for the document? (USUALLY SHOULD NOT BE MAJORED!)

4. Do the majored terms represent the emphasis of the document?

5. Are all appropriate concepts included in the indexing, including those outside the scope of this Clearinghouse?

6. Has the "Rule of 7" been followed: maximum of 6 major Descriptors (and 1 major Identifier, if used); maximum of 5 major Descriptors if 2 Identifiers are majored.

7. Do the Descriptors assigned conform with the Thesaurus as to spelling, format, etc.? NOTE: although the Working Copy lists everything in upper case, only the first letter of each word in a Descriptor should be capitalized--except phrases such as Futures (of Society); Trade and Industrial Education.

8. Descriptors corresponding exactly to Pubtype Codes should be assigned only if the subject of the document. (This rule applies to minor as well as major use. See list on page viii of Working Copy.)

9. Have NTs been posted along with BTs from the same hierarchy? If so, are both levels truly appropriate? That is, does the indexing match the level of specificity of the document?

10. Are very broad, top-of-the-hierarchy terms being used? (See page 45, Section 7, Processing Manual.) Are other, more specific terms more appropriate?

11. If foreign countries are discussed, is the Descriptor Foreign Countries assigned?

12. Is the format of Identifiers as it appears in the Identifier Authority List? (See Processing Manual, Section 8, part 2, when creating new Identifiers.)

13. Identifiers should have no punctuation. There is a 50-character limit.

14. Are the Identifiers in alphabetical order?

15. For Congressional documents, is the appropriate Identifier assigned (e.g., Congress 98th, Congress 100th)?

16. For ERIC Digests, is the Identifier ERIC Digests assigned (and the pubtype 071)?

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
COUNSELING AND PERSONNEL SERVICES

Prepared by

Nancy Beekman

May 1989

1032

Counseling and Personnel Services Clearinghouse

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INDEXING RULES - CG
General Rules

1. Number of Index Terms

12 for RIE and 10 for CIJE (average)*
6 major descriptors and major identifier, or 5 major descriptors and 2 major identifiers (maximum)*
Assign at least 1 major descriptor to every document
Avoid using - or majoring - too many descriptors beginning with the same word (e.g.,"counseling)

*Don't try too hard to keep these numbers. Some documents don't require many index terms. Better to keep numbers low than to put in unimportant terms.

2. Major/minor

Normally we do not major:
  Educational Level (assigned first, before any other indexing is done)
  Age Level
  Document Type
  Research Methodology
  Subjects or population
  Very broad or general descriptors

3. Population Terms

Index by specific groups: Battered Women, Gifted, Employed Women
Ethnic Groups/Nationalities/Socioeconomic Status/Intelligence or Ability Level
Personnel Groups/Physical or Emotional Characteristics/Sex
Age Level - age levels should be used as in ERIC categories - not necessarily author categories

4. Educational Levels

Always use educational levels and population descriptors together for research using student populations as subjects, e.g.: Higher Education and College Students; Higher Education and Undergraduate Students.
Always use most specific educational level possible - paying attention to grade level of population
Always include all grades of subjects - may be necessary to use more than one educational level descriptor (e.g., use of Intermediate Grades and /or Junior High Schools to describe middle school populations)

5. Miscellaneous

Always use Foreign Countries as a minor descriptor for documents/articles about countries (populations included) other than the U.S.A., coordinating the name (s) of the specific country/countries (and geographic sub-divisions) in the Identifier field. Geographic identifiers may be major or minor as appropriate.

ERIC©

Garry R. Walz, Director

Counseling and Personnel Services Clearinghouse

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Ann Arbor, Michigan 48109-1259 (313) 764-9492

Scope Area Rules

Use most specific counseling term (s), e.g. adult, career, educational, family, individual, marriage, nondirective, parent, peer, rehabilitation, school. See counseling hierarchy.

Always use most specific descriptor to identify educational level, population, etc., without omitting any of the subjects. Use identifiers for additional/supplemental specificity, as appropriate. Not necessary nor desirable to also index Males and Females when indexing Sex Differences.

Always pay close attention to restrictions delineated in Scope Notes.

Types of Research: Use minor descriptors such as case studies, comparative analysis, trend analysis, longitudinal studies, followup studies, national surveys, or state surveys when appropriate to facilitate retreival. National Surveys, Trand Analysis, and Longitudinal Studies are especially helpful in searching. Use Questionnaires (as a minor) and pubtype 160 on documents that include the actual survey instrument.

**Do not think you can automatically index by terms used by authors. Take the time to read scope notes to determine whether the author's terminology is appropriate for indexing. Some examples:

Anglo Americans - authors often use term to mean whites or white students.
Age Levels -"Older adults" sometimes doesn't mean Older Adults in ERIC's sense (one recent article used the term for those over 40).

IDENTIFIERS:

Don't be reluctant to use identifiers

Always index the following types of identifiers when they're the subjects of documents (use the IAL precedents):

Institution or association names (don't index them if they merely prepare a report, unless it is an official position paper or similar statement);
College or university names;
Persons;
Laws (enacted, not proposed);
Geographic Regions;
Foreign country names (be sure to note ERIC's idiosyncrasies for Canada and the U.K.);
Test names;
Computers and computer programs;
Specific theories, forms of counseling/therapy. ect., not found the Thesaurus;
New terms in the field, especially those being written about frequently. In our case,such terms include Bereavement, Osteoporosis, Access to Health Care, Acquaintance Rape, Child Protection, Informed Consent, Discharge Planning, Computer Assisted Counseling, School Based Health Clinics

ERIC®

Garry R. Walz, Director

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
READING AND COMMUNICATION SKILLS

Prepared by

Nola Kortner Aiex

May 1989

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CS In-House Indexing Procedures

1. Major and Minor Terms

a. Index concepts or terms (descriptors and identifiers) must reflect the language and precedents of the ERIC Vocabulary, i.e., the ERIC Thesaurus and IAL.

b. CS averages 10-11 descriptors and identifiers per document. It depends very much on how narrow the focus of the document is.

c. Maximum majors permitted are: 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers.

d. Every citation must have at least 1 major descriptor, and no more than 2 major identifiers. Fewer majors are usually desirable for narrowly focused topics.

e. Index to the most specific term; never index up to broader terms unless they're equally the subjects of documents.

f. Index the document/article in hand -- don't make assumptions.

g. The amount of indexing should reflect the size and depth of the document/article, e.g., a large document should almost certainly have more index terms than a five page journal article.

h. Avoid overindexing and underindexing (see "overindexing," item 8," below) -- consider only the significant and essential concepts of the document.

i. Too many minor descriptors are confusing; use the most important ideas. Accumulations of more than 20 terms per document should be given a second look.

j. Be careful not to overload with more than two major descriptors beginning with the same word (important for manual searching).

k. Always look at the document's title before concluding your indexing, to see if you've missed any significant topic(s).

1. Try to assume the searcher's point of view. Can the specific topic(s) covered be retrieved by the assigned index terms? Would an item retrieved by the assigned index terms be relevant or useful?

2. Population Terms

a. Use descriptors to refer to the groups or individuals studied or discussed in a document. These are normally not majored unless they're the subject or an important aspect of the document.

b. Types of terms that describe population include:

Educational level
  (must be assigned if the document deals with it--
  see item 3, below);
Age level;
Ethnic group
  (race, religion, nationality);
Intelligence or ability level;
Physical/emotional characteristics;
Socioeconomic characteristics;
Sex.

3. Educational Level Descriptors

a. Must be indexed if dealt with in a document.

b. Indexers should acquire the habit of assigning education levelers first, before any other indexing is done.

c. Always use the most specific educational level possible.
EX -- Use Elementary Education for grades K-6 (students aged approximately 5-12), Primary Education for grades K-3 (ages 5-9), Intermediate Grades for grades 4-6 (ages 9-12).

d. Minor when they describe the level at which something, i.e., the document subject, occurs (the usual case).
EX -- A report on literacy among high school seniors.

e. Major only when the levels themselves are the subject.
EX -- Philosophy of, theory of, history of, important legislation concerning.

f. Use specific grade descriptors, e.g., Grade 7, Grade 2, in addition to educational level descriptors. However, avoid indexing grade ranges (e.g., Grade 7, Grade 8, and Grade 9) when they're essentially equivalent to a level (i.e., Grades 7, 8, & 9 = Junior High Schools).

g. If appropriate, more than one level may be assigned. EX -- Intermediate Grades and/or Junior High Schools to describe middle school populations; Higher Education and Elementary Education to describe preservice preparation for elementary school teachers.

h. If there is no educational level, try to use an age level.

i. See lists of educational level descriptors and age level descriptors in Thesaurus front matter and in the Indexing Handbook.

4. Form Descriptors

a. When indexing research documents (unless there is an exact overlap with Pubtype codes), care is taken to include a descriptor (minor) describing the type of study, e.g., Case Studies, Field Studies, Cross Sectional Studies, Ethnography, Longitudinal Studies, State Surveys, National Surveys, School Surveys, Comparative Analysis, Trend Analysis, Followup Studies. If a document talks in detail about how to conduct these studies, term(s) are assigned major. (See Thesaurus front matter or Indexing Handbook for "exact overlap" descriptors and associated Pubtype codes.)

b. When indexing educational practitioner documents or guides, care is taken to include a descriptor (minor) describing the type, e.g., Lesson Plans, State Curriculum Guides, Resource Materials, Units of Study, Instructional Materials, Textbooks, Workbooks, Faculty Handbooks, Laboratory Manuals, Study Guides, Test Manuals.

c. The minor descriptor Questionnaires and the pubtype code 160 are used for documents that include the actual survey instrument.

5. Identifiers

a. Identifiers are specific indexed entities that do not appear in the ERIC Thesaurus.

b. Do not be reluctant to use identifiers, but avoid making up words or using the author's terminology indiscriminately. Names of more than one word must follow a consistent spelling pattern, i.e., an IAL precedent.

c. Always index the following types of identifiers when they're the subjects of documents (using the IAL precedents):

  Institution or association names
    (not indexed if they merely prepare a report, unless it is an official position paper or similar statement; avoid indexing public school names unless they're particularly significant-- instead, index the name of the school district);
  College or university names;
  Persons;
  Laws (enacted, not proposed);
  Geographic Regions;
  Foreign country names
    (coordinated with the minor descriptor Foreign Countries -- ERIC's idiosyncrasies for Canada and the U.K. are followed);
  Test names;
  Computers;
  Computer Programs;
  Specific methods, theories, ideas, etc., not found in the Thesaurus, e.g., Analogies, Author Reader Relationship, Collaborative Learning, Cultural Literacy, Editorial Policy, Entertainment, Metaphysics, Plot (Fiction), Press Law, Professionalism, Rhetorical Effectiveness, Riddles, Right to Read, Romance Novels, Structuralism, Supreme Court, Uncertainty Reduction, Vocal Intensity;
  New terms in the field, especially those being written about frequently.

6. Target Audience

a. Use the audience field only when the document or article explicitly directs itself to an audience, e.g., "...intended for school teachers..." Don't guess who might want to use it.

b. Even if the article is in a journal published by a research society, teacher association, administrator organization, etc., only use the audience field when an article specifically mentions a particular audience. If not absolutely clear, leave this field blank.

7. Index Terms versus Terms in the Abstract

a. Indexed descriptors must actually be in the ERIC Thesaurus (only main terms are indexable). Identifiers must either be in the IAL or, if new, reflect the precedents established by the IAL. (Thesaurus "use references" are non-indexable even as identifiers.)

The abstract is reserved for the author's words, i.e., the actual language of a document.

b. Do not purposefully substitute ERIC index terms for an author's terminology in the abstract.

8. Overindexing

a. Very broad descriptors should be avoided where possible, especially as majors.

EX: Curriculum, Evaluation, Reading, Speech, Children.

b. Do not trivialize the indexing process by assigning terms "automatically" in a certain way:

EX: Continual use of peripheral "population" terms such as Males, Females, (iden) Male Female Relationship, Editors, (iden) Editor Role, (iden) Journalists, (iden) Journalist Role, when the more inclusive descriptors Sex Differences, Editing, and Journalism adequately cover the subject.

c. Pubtype and methodology index terms such as Correlation, Comparative Analysis, Case Studies, Questionnaires, and Surveys are assigned minor status to facilitate computer searching. Common errors to be avoided in pubtype/methodology indexing include:

-- Use of the broad term Surveys when an appropriate narrower term is available, e.g., National Surveys, State Surveys, School Surveys.

-- Overindexing the descriptor Attitude Measures on survey documents (a practice that deters utility of the term for subject retrieval) instead of appropriately coordinating ...Surveys with a specific term from the Attitudes hierarchy, e.g., Reading Attitudes, Student Attitudes.

-- Overindexing such identifiers as "Historical Background" and "Students as Subjects," especially as majors; such indexing serves no useful purpose and invalidates any subject-retrieval utility these terms could have (i.e., nearly all research documents contain background statements and most [in ERIC] have students as subjects). Consider an example.

A document "An Historical Study of Elementary School Reading," incorrectly indexed with:

DESC_*Elementary Education; *Reading
Instruction; *Reading Research
IDEN_*Historical Background; *Students as
Subjects

could be corrected as follows:

DESC_*Educational History; Elementary Education;
*Elementary School Students; *Reading
Instruction
IDEN_(None)
PUBTYPE_060; 143

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
EDUCATIONAL MANAGEMENT

Prepared by

Mary Lou Finne

May 1989

1042

UNIVERSITY OF OREGON

IN-HOUSE INDEXING GUIDELINES

ERIC Clearinghouse on Educational Management

DESCRIPTORS

System Averages (including identifiers): 12 for RIE documents; 10 for CIJE articles.

MAJOR DESCRIPTORS: At least one must be assigned to each document. Remember that you can have 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers. Think of 5 and 2 or 6 and 1. Be sure to count the asterisks so that you do not use too many majors. Try to have your major descriptors summarize the document.

Major/Minor

Unless the following are the subject of the document, do not major: educational level, age level, form of document, and research methodology. Watch the Thesaurus for terms that say "Do no major unless subject of document."

For example, ANNOTATED BIBLIOGRAPHIES can be majored, BIBLIOGRAPHIES cannot even be used as a descriptor unless the document is about writing bibliographies. (Use DT=131)

Read the comments under the term in the Thesaurus. You will find some terms that say USE--e.g. "Videotape Cassette Recorders," USE VIDEOTAPE CASSETTES and VIDEOTAPE RECORDERS. Attempting to index with nonindexable USE references is the most common indexing error made by new document analysts.

EDUCATIONAL LEVEL TERMS

Get into the habit of assigning educational level first, before any other indexing is done. Much of our material refers to the K-12 grade level - use ELEMENTARY SECONDARY EDUCATION. However, always use the most specific education level term possible. For example, use SECONDARY EDUCATION for grades 7-12 (students aged approximately 11-18), or HIGH SCHOOLS for grades 9-12 (students aged approximately 13-18).

MIDDLE SCHOOLS is a descriptor, but not an educational level term, so you must also use JUNIOR HIGH SCHOOLS and/or INTERMEDIATE GRADES.

ERIC CLEARINGHOUSE ON EDUCATIONAL MANAGEMENT
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SPECIFICITY and GENERALITY

Be specific but try to give the searcher a couple of paths to access the information, e.g., for a research paper on principals, along with Principals, one might use Administrator Role, Administrator Attitudes, Administrative Policy, School Administration, etc. This will help the person wanting principals only and also will help someone doing a broader search of principals, superintendents, assistant principals, etc.

Watch the specificity of the document, i.e., an article on school law discusses dismissal of personnel but never says teacher dismissal, so use the broader term Dismissal (Personnel).

Descriptor-Court Litigation. Use as a major when it is a summary or an administrator guide about school law cases; also use DT=090. Use as a minor when discussing one or two court cases, make a judgment call on whether Legal Responsibility or a similar descriptor is needed.

SPECIAL CASES

Use the descriptor Public Schools if the document or article refers to something that could ONLY be at a public school; i.e. elected boards of education. If it is about something that could also be applicable at a private school; i.e., ways that teachers and administrators could have better relationships, then only use the appropriate education level term
If the title includes Public Education/Schools, i.e. The State of Public Education in the U.S. today, then include Public Education or Public Schools as a major term. Use Private Education, Private Schools, or an appropriate narrower term (e.g., Parochial Schools) when that is the exclusive topic.
If the article compares and contrasts public and private schools, then use both "public" and "private" descriptors.

IDENTIFIERS

Don't be reluctant to use identifiers.

Always index the following types of identifiers when they're the subjects of documents (use the IAL precedents):

- Institution or association names
  (don't index them if they merely prepare a report, unless it is an official position paper or similar statement)
- College or university names
- Persons
- Laws
  (enacted, not proposed)
- Geographic regions

Foreign country names
(be sure to note ERIC's idiosyncrasies for Canada and the U.K.)

Test names

Computers

Computer programs

Specific methods, theories, ideas, etc., not found in Thesaurus, e.g., Risk Management, Professionalism, First Amendment

New terms in the field, especially those being written about frequently

Maximum of 2 major identifiers. If the document is about a foreign country (including Canada) always major the name of the country as an identifier and use Foreign Countries as a minor descriptor. In the rare case that the document concerns 6 foreign countries, major the descriptor Foreign Countries and, if appropriate, 2 of the 6 'country" identifiers. Note that identifiers for Canada and the U.K. name the province or state alone, followed by the city or other geopolitical subdivision in parentheses, just as we do with U.S. states and cities. Don't say Canada or United Kingdom unless it is about the whole country. Don't say Great Britain unless you mean England, Scotland, and Wales, but not Northern Ireland.

Name of school. If it is a higher educational institution and an important subject of the document, name it; if it is a specific public grade or high school, it should not be named as an identifier unless it is really outstanding. Instead, index the school district's name.

Name of school district. List as an identifier if that is an important subject of the document. Look up the school district in the Identifier Authority List to see how it is listed; if it is not there, look at the Directory of Public School Systems in the U.S. and see how it is listed since the naming system varies by states.

Except for parentheses, no punctuation in identifiers, even if it is used in the title and the abstract. Law cases--use Jones v. Jones in the abstract, but the Identifier would be Jones v Jones. Also look up court cases in section 14 of the Identifier Category Display.

TARGET AUDIENCE

Catalog the Target Audience field only if the article or document explicitly directs itself to an audience, e.g., ". . . intended for school administrators . . ." Don't guess who might want to use it. Even if the article is in a journal published by an organization of administrators, school board members, etc., only use the audience field when an article specifically mentions a particular audience.

DOCUMENT TYPE

055	"how to do it" for administrators
141	how our school system does it
142	an evaluation of a teaching practice or change in school conditions
143	research paper with real data, i.e., a sample of 25 teachers, interviews with 30 families; it doesn't have to meet strict methodological sample design criteria
021	conference proceedings if it includes all of the papers or a summary
150	a single conference paper or speech. Cannot be used alone, usually is also a 120 and/or a 143
022	serials. Use for publications that have the month and year on them
160	Use with the descriptor Questionnaires (minor) on documents that include the actual survey instrument

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
HANDICAPPED AND GIFTED CHILDREN

Prepared by

Judi Conrad

May 1989

CEC

ERIC

DEPARTMENT OF INFORMATION SERVICES
THE COUNCIL FOR EXCEPTIONAL CHILDREN

THE ERIC CLEARINGHOUSE ON
HANDICAPPED AND GIFTED CHILDREN

INHOUSE INDEXING GUIDELINES

ERIC Clearinghouse on Handicapped and Gifted Children

1. EC documents are almost always indexed with one or more terms taken from the attached list of exceptionalities. EC almost always majors one or more of these exceptionality terms.

2. Sometimes euphemisms must be translated into descriptors, especially in the area of mental retardation (e.g., moderately handicapped almost always means moderate mental retardation); EC always refers to the context of the document or article to make such a determination.

3. EC almost always includes the disability concept which appears in the index terms in the abstract as well. However, while indexed descriptors must reflect the language of the Thesaurus, concepts expressed in the abstract should reflect the actual language of the document or article. EC checks to see if the index terms adequately reflect all the concepts presented in the abstract.

4. EC assigns educational level descriptors first, before any other indexing is done. EC alternately attempts to assign one or more age level descriptors when educational levelers are inappropriate.

5. EC always relies on the text when there is a conflict between the author's abstract and the text.

6. EC usually majors one or more (but no more than three) exceptionalities. However, all exceptionalities covered significantly by a document are indexed.

7. EC usually indexes the major term *Disabilities when a document talks about more than three disabilities or the handicapped in general.

8. EC believes the usefulness of mandatory education level terms is questionable when indexing documents or articles dealing with the severely mentally retarded; in such instances, therefore, an age level descriptor is generally substituted.

9. EC reserves major descriptors for pure subject content. Other content aspects such as methodology and document type are assigned minor status. For instance, EC covers a fair amount of personal narratives (e.g., "How I Coped with My Disability"). Documents such as these are indexed with the minor descriptor Personal Narratives and generally coded Pub Type 120. Narrations of personal successes by practitioners are alternately coded Pub Type 052 or Pub Type 053, since the intent is usually for others to replicate the practices.

10. EC believes that the amount of indexing should reflect the size and depth of the document or article (e.g., a large document should almost certainly have more descriptors than a five page journal article).

11. EC avoids indexing and especially majoring very general terms.

12. EC translates the concept profoundly hearing impaired and hearing losses in the >75 db range to the ERIC descriptor Deafness.

13. EC uses the term Limited English Speaking rather than Bilingualism for handicapped speakers of limited English as a foreign language. Such populations additionally require an exceptionality descriptor.

14. EC uses the term College Students (or an NT), the leveler Higher Education (or Two Year Colleges), and an exceptionality descriptor when indexing material dealing with disabled college students. The exceptionality term may be majored or minored, as appropriate.

15. EC adds the term Case Studies to single subject research studies (of which there are a considerable number in special education), so that they may be eliminated if the user is not interested in single subject studies. Lately, however, we have also been using the identifier Single Subject Research Design.

16. EC uses Accessibility (for Disabled) to cover a broad spectrum of access, since the scope note includes programs as well as buildings. We additionally use Physical Mobility or Visually Handicapped Mobility to describe physical access.

17. EC uses the 160 pub type and the minor descriptor Questionnaires on documents that contain the actual survey instrument.

18. EC attempts to index the broad concepts of each chapter in a book of readings to assure adequate representation, e.g., a chapter that deals with five or six major disabilities would be indexed under the broad term Disabilities, and, if significantly covered, the specific disability terms; a chapter on the gifted learning disabled would be indexed under Gifted Disabled, Learning Disabilities, and the identifier Gifted Learning Disabled. The broadest concepts for the entire book would carry the majors.

Exceptionality Terms

ERIC Clearinghouse on Handicapped and Gifted Children

DISABILITIES

___ Disabilities
___ Severe Disabilities
___ Mild Disabilities
___ Congenital Impairments
___ Adventitious Impairments
___ Multiple Disabilities
___ Deaf Blind

PHYSICAL DISABILITIES

___ Physical Disabilities
___ Cleft Palate
___ Cerebral Palsy
___ Amputations

MENTAL RETARDATION

___ Mental Retardation
___ Mild Mental Retardation
___ Moderate Mental Retardation
___ Severe Mental Retardation
___ Downs Syndrome
___ Developmental Disabilities

LEARNING DISABILITIES

___ Learning Disabilities
___ Language Handicaps
___ Aphasia
___ Dyslexia
___ Attention Deficit Disorders
___ Perceptual Handicaps
___ Hyperactivity
___ Neurological Impairments
___ Minimal Brain Dysfunction
___ Head Injuries

MENTAL DISORDERS

___ Mental Disorders
___ Emotional Disturbances
___ Neurosis
___ Psychosis
___ Autism
___ Schizophrenia
___ Behavior Disorders

COMMUNICATION DISORDERS

___ Communication Disorders
___ Reading Difficulties
___ Language Handicaps

SPEECH HANDICAPS

___ Speech Handicaps
___ Articulation Impairments
___ Cleft Palate
___ Delayed Speech
___ Voice Disorders
___ Aphasia
___ Stuttering

HEARING IMPAIRMENTS

___ Hearing Impairments
___ Deafness
___ Partial Hearing

VISUAL IMPAIRMENTS

___ Visual Impairments
___ Blindness
___ Partial Vision

GIFTED

___ Gifted
___ Academically Gifted
___ Talent
___ Gifted Disabled
___ Creativity
___ Gifted Learning Disabled

CHILD ABUSE

___ Child Abuse
___ Sexual Abuse
(Child Abuse and Sexual Abuse
are used for "Child Sexual Abuse")

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19. EC makes the following distinction between Individualized Education Programs, Individual Instruction, and Individualized Instruction: Individualized Education Programs (IEPs) are required by law and are clearly prescribed. Individual Instruction is simply one-on-one instruction; and Individualized Instruction may or may not be one-to-one instruction.

20. EC reserves the term Special Education to index broad issues, trends, and concerns in the field. Special Education is not automatically assigned to every document indexed by EC.

SPECIAL HEALTH PROBLEMS

___ Injuries
___ Diseases
___ Alcoholism
___ Allergy
___ Anemia
___ Sickle Cell Anemia
___ Anorexia Nervosa
___ Bulimia
___ Cancer
___ Communicable Diseases
___ Heart Disorders
___ Rubella
___ Veneral Diseases
___ Hospitalized Children
___ Homebound
___ Diabetes
___ Drug Addiction
___ Hypertension
___ Obesity
___ Occupational Diseases
___ Poisoning
___ Lead Poisoning
___ Seizures
___ Epilepsy
___ Asthma
___ Medically Fragile

NOTE: Underscored terms are Identifiers, not Descriptors.

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
LANGUAGES AND LINGUISTICS

Prepared by

Darla Domke

May 1989

ERIC®
ERIC Clearinghouse on
Languages & Linguistics

Charles Stansfield, Director
Jeanne Rennie, Associate Director

ERIC Clearinghouse on Languages and Linguistics
IN-HOUSE INDEXING GUIDELINES

Indexer's Purpose: to find the concepts that best reflect the content of a document and "translate" those concepts into appropriate descriptors (and identifiers, where appropriate), so users may gain access and retrieve the information they need.

Rule 1: *Descriptors/identifiers must capture all the significant, essential ideas of the entire document: the actual content, the main idea.* Supplemental index terms (identifiers) are used for specific entities and concepts that cannot be conveyed by descriptors. Index terms must reflect the language and precedents of the ERIC vocabulary rather than the language and vocabulary of the document.

Rule 2: *Concepts must be indexed at their level of specificity.* If a document refers to a university-level second language program, the document should be indexed with *College Second Language Programs* instead of *Second Language Programs.*

When in doubt about whether to use a particular term, ask yourself whether users searching that term would want to see the document retrieved, or whether they would be disappointed.

Rule 3-1: *All concepts of a document must be translated, wherever possible, into appropriate ERIC* ***descriptors****, found in the ERIC Thesaurus.* Descriptor vocabulary for a given concept may not be the same as the vocabulary used in the document. It is important, therefore, to use the Thesaurus to locate the descriptor that is closest in meaning to the concept referred to in the document. Descriptors cannot be made up. All descriptors must come from the *ERIC Thesaurus.*

A. Remember to index the ***mandatory education level*** descriptors first, before any other indexing is done. For every document, ask yourself whether an educational level descriptor should be assigned. If an educational level descriptor is inappropriate, consider using an age level descriptor. Leveling descriptors should normally be minor.

B. Always ask yourself whether or not a document deals with a ***specific population*** (e.g. ethnic group? socioeconomic status? nationality? intelligence or ability level? physical or emotional characteristic? sex? personnel group?). Minor the population group descriptor/identifier unless it is the specific subject of a document.

Rule 3-2: If you can't find a descriptor to fit a concept, check the Identifier Authority List (IAL). *All concepts of a document concerning specific entities or new terminology not found in the Thesaurus must be "translated" into appropriate ERIC identifiers, found in the IAL.* Don't be reluctant to use identifiers, but avoid making up words or using an author's terminology indiscriminately. Names of more than one word must follow a consistent spelling pattern, i.e., an IAL precedent. No punctuation other than parentheses (for qualifying) may be used.

Always index the following types of identifiers when they are the subjects of documents:

- Institution or association names (not indexed if they merely prepare a report, unless it is an official position paper, description of a particular program, or similar statement);
- College or university names (EX: University of Illinois Urbana Champaign--note there's no hyphen between "Urbana" and "Champaign");
- Persons;
- Laws (enacted, not proposed);
- Geographic Regions;
- Foreign Country Names (coordinated with the minor descriptor *Foreign Countries*-- be sure to note ERIC's idiosyncracies for Canada and the U.K.);
- Test names;
- Computers (EX: Apple Macintosh);
- Computer Programs;
- Specific methods, theories, ideas, etc., not found in the Thesaurus, e.g., Anaphora, Natural Order Hypothesis (Language), Biliteracy, Chicanos (also, Chicanas)-- (note: *Chicanos -as* is "upindexed" to the descriptor *Mexican Americans*, then carried additionally as a supplemental identifier);
- New terms in the field, especially those being written about frequently.

Rule 4: *Once descriptors have been found, they must be either majored (marked with an asterisk *), or minored. At least one major descriptor must be assigned to every document.* Despite the total number of descriptors and identifiers used, the absolute maximum number of majors is 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers. It is important not to over- nor under-index. Very broad descriptors should be avoided where possible, especially as majors. EX: *Modern Languages; Languages; Curriculum; Evaluation,* etc. Descriptors such as *Language Research , Statistical Analysis, Statistical Data* are generally avoided as well, since the publication type usually catalogs the concepts (PUBTYPE_143 or PUBTYPE_110), unless, of course, *Language Research,* etc., is the topic of the document.

Avoid over-indexing and over-majoring. Consider only the most significant and essential concepts of a document. Be conservative!!

ERIC/CLL's INDEXING IDIOSYNCRACIES

1. Documents on all modern languages except English, French, German, Spanish, Italian, and Russian, are indexed with *Uncommonly Taught Languages* in addition to the specific language name. Major *Uncommonly Taught Languages* only when UCTs in general, or when several specific UCTs or UCT families are the topic of a document.

2. Foreign countries are indexed as identifiers, with *Foreign Countries* serving as mandatory descriptor. Country names are subdivided by parenthetical qualifiers, e.g., *Mexico (Tijuana).* Note that identifiers for Canada and the U.K. name the province or state alone, followed by the city or other geopolitical subdivision in parentheses. Don't index *Canada* or *United Kingdom* unless you mean the entire country. Don't index *Great Britain* unless you mean England, Scotland, and Wales, but not Northern Ireland. Country names

are majored if they are the subject of a document. The descriptor *Foreign Countries* may be majored when it's the broad subject or when more than 2 country names are subject-indexed (i.e., more than the maximum 2 major identifiers).

3. All documents dealing with foreign languages at the elementary school level should be indexed with *FLES* .

4. English as a Foreign Language (EFL) and English as a Second Language (ESL) take the same descriptor, *English (Second Language).* In the case of EFL, index the descriptor *Foreign Countries* and the foreign country or countries referred to in the document as (an) identifier(s).

5. Distinguish between the name of a language and its speakers. EX: *Japanese* is a descriptor used to refer to the language; *Japanese Americans* is a descriptor referring to Americans of Japanese origin; *Japanese People* is an identifier that refers to the Japanese living in Japan.

6. Minor descriptors such as *Correlation, Comparative Analysis,* and *Case Studies* should be used if appropriate to a document to facilitate computer searching. *Questionnaires* (minor) is used with PUBTYPE_160 for documents that include the actual survey instrument. Avoid using the broad term *Surveys* when an appropriate narrower term is available, e.g., *National Surveys, State Surveys, School Surveys.*

7. Journal writing as a technique to improve writing skills takes the descriptor, *Student Journals* and/or *Journal Writing,* not the descriptor, *Diaries.*

8. Use *English Instruction* for the teaching of native speakers of English only.

9. *Second Language Instruction* and *Second Language Learning* should be majored only when the specific topic of a document. More specific descriptors should be majored, e.g., *Suggestopedia, Communicative Competence (Languages), Language Tests,* etc. Major *Second Language Learning* when the topic of a document is "Second Language Acquisition."

10. The descriptor, *Language Acquisition,* should be used only when referring to native language acquisition.

11. For descriptions of foreign language programs, use more specific descriptors like *Immersion Programs or College Second Language Programs* when appropriate instead of *Second Language Programs.*

12. A concept derived from, for example, linguistic theory need not be written as a new identifier. EX: A document on "Generalized Phrase Structure Grammar" may be indexed with the descriptors, *Phrase Structure* and *Transformational Generative Grammar.* It is important not to make up new identifiers indiscriminately. Look up the word or phrase in the *IAL* first. Try every way to correlate the new concept with already existing descriptors or identifiers.

13. The term "Aspect" in grammar does not refer to tense of verbs, but rather to the temporal constituency of a situation. The descriptor, *Tenses (Grammar)* should be avoided when the document refers to "Aspect" of verbs, unless "tense" of verbs is also discussed. Use the identifier, *Aspect (Verbs)* for these documents.

CATALOGING

Levels: For Level 3 documents, photocopy the cover page, ISBN and availability page, table of contents, preface or introduction pages and send to**Facility**with shipment. Number of pages must be included in Level 3 citations, e.g., PAGE_129.
Level 2 documents that have reproduction problems must state the situation in the Note field, e.g., "Print marginally legible." (See EPM, Section V, "Descriptive Note," for additional examples.)

Title field: For journals in RIE, put title, volume, and number of journal in title field and in the journal field if entire journal is entered. If only one article is entered, put the name of the article in the title field and the journal name, volume, number, pagination, and date in the journal field. Usually, "Volume" and "Number" are written out if part of a main title, and abbreviated "Vol." and "No." in a subtitle, but catalogers are generally encouraged to follow the format given on the journal cover or title page.

Note field: Analytics!!! The things that drive Carolyn up the wall! The latest information from the Facility in cataloging sibling documents for analytics (not in the EPM) is: (1) **do not** include individual page numbers; (2) **do not** include city and publisher ; and (3) **do not** include the FL numbers for related documents; (4) **do** include only the date of the parent document followed by a semicolon, followed by its FL No. [" see FLxxx xxx."] **For the parent document, do** refer to individual articles; EX: "For (selected) individual papers, see FLxxx xxx-xxx."
OTHER: Put period at end of note field. Refer to physical layout of document when appropriate: ["NOTE_Small light print may not reproduce clearly."]

Pubtype: 022 for series

Inst: a series title may or may not have an institutional source (individuals do not generally publish series)

Geo: In documents from England, the GEO_ field should read: *United Kingdom; England.* Documents from Australia and Canada should read: either Australia or Canada, followed by the name of the specific province or territory, e.g., *Australia; Australian Capital Territory.* Identifiers for Australia are formed with the country name, followed by a city or other unit in parentheses, e.g., *Australia (Brisbane).* Identifiers for Canada and the United Kingdom, however, are structured by province (Canada) or major political dividion (U.K.), e.g., *Quebec (Montreal), England (London).* Use identifiers *Canada* or *United Kingdom* only when the topic is the entire country. Don't use *Great Britain* as an identifier unless the topic is the island of Great Britain, i.e., including England, Scotland, Wales, but excluding Northern Ireland. Consult the IAL for additional appropriate forms.

Avail: For journals that go into RIE, don't use semicolons in entry. An individual's name is rarely included with availability address. Read release form carefully, for it may contain more up-to-date availability information than is indicated in the document. Include UMI availability when indicated on the release form (usually Level 3 documents); show order number where available, but exclude UMI prices since they change frequently. EX: AVAIL_University Microfilms International, 300 N. Zeeb Rd., Ann Arbor, MI 48106 (Order No. 88-14955). For journals not available through UMI, list complete ordering information, including price if available. EX: AVAIL_Cambridge University Press, 32 E. 57th St., New York, NY 10022 (institutions- $34.00, individuals- $20.00).

For foreign journals entered in RIE, translate cover page and any other pages with availability information.

Descriptors/Identifiers: see guidelines for indexing

Abstracts: An opening statement summarizes the content of the document. Further statements may make references to appendices, survey, sample lesson plans, materials, etc.

Punctuation: Prepositions in titles are in lower case; Identifiers do not take punctuation (except parentheses). Rules of punctuation with quotation marks are as follows:

"This is a sentence."
"This sentence,"
"This sentence...";
"This sentence":

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
HIGHER EDUCATION

Prepared by

Lynn Barnett

May 1989

ERIC EDUCATIONAL RESOURCES INFORMATION CENTER
Clearinghouse on Higher Education
THE GEORGE WASHINGTON UNIVERSITY

INDEXING GUIDELINES

BASIC:

1. Use the most recent edition of the working copy of the Thesaurus.
2. Use the most recent edition of the Identifier Authority List. Write in additions as you use new identifiers.
3. Keep your Thesaurus and IAL in a single notebook so you can refer to both at once.
4. Identify major descriptors and identifiers with an asterisk

NUMBER:

1. System average is 12 terms for RIE and 10 for CIJE, including both descriptors and identifiers. Index to the content level of the particular document or article.
2. Assign at least 1 major descriptor to every document or article.
3. Watch for too many majors. The total can't exceed 7 (5 descriptors and 2 identifiers or 6 desc and 1 iden).

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MAJOR/MINOR DESCRIPTORS:

1. Be careful not to overload with more than two major descriptors beginning with the same word (important for manual searching).

2. Unless the following are the subject of the document, do not major:

   -- educational level (see discussion below about the concept of "higher education"). Assign first, before any other indexing is done.

   -- age level

   -- form of document (e.g., pubtype-type descriptors)

   -- research methodology (e.g., COMPARATIVE ANALYSIS, GRADUATE SURVEYS). Avoid use of broad term SURVEYS whenever possible.

   -- population studied (e.g., MINORITY GROUPS, COLLEGE PRESIDENTS)

   -- very broad or general descriptors (e.g., PROGRAM DESCRIPTIONS, TABLES (DATA), MODELS)

3. Always use FOREIGN COUNTRIES as a minor descriptor for documents/articles about countries and populations other than the U.S. Also use the specific country name (and geographic subdivisions) as a major or minor identifier as appropriate.

   Use the descriptor DEVELOPING NATIONS (used for "Third World"), in addition to FOREIGN COUNTRIES, only when the subject is national or international social and economic development. DEVELOPING NATIONS is a socioeconomic concept and should be used only in that sense (e.g., don't use it for "Teaching Reading in the Sudan," unless the idea is reading for economic development, etc.)

   DEVELOPING NATIONS, when used, is often a major descriptor.

   The descriptor DEVELOPED NATIONS (i.e., industrialized countries) also a socioeconomic term, may also be indexed along with FOREIGN COUNTRIES when appropriate.

   Both DEVELOPING NATIONS and DEVELOPED NATIONS may be major or minor descriptors, depending on the document.

EDUCATIONAL LEVEL

1. HIGHER EDUCATION should be on nearly every document unless it is totally uncalled for and no level is applied, or if POSTSECONDARY EDUCATION is more appropriate.

2. POSTSECONDARY EDUCATION should be on documents that include discussions of technical institutes or proprietary schools as well as two- or four-year colleges. POSTSECONDARY EDUCATION should not be used on documents dealing with American two- and four-year colleges only. (Use HIGHER EDUCATION on them.)

3. Include TWO YEAR COLLEGES when that concept is important to the document. Use it without HIGHER EDUCATION if a document refers to just two-year colleges or associate degree programs. (Such documents are typically indexed by the JC Clearinghouse, but sometimes they come to HE as part of a series or part of the ASHE conference papers, which we put in RIE as a group.)

4. Look over foreign documents/articles carefully. Many times the descriptor POSTSECONDARY EDUCATION is better than HIGHER EDUCATION, especially for non-U.S. materials referring to "colleges" or other "tertiary education" institutions that may not offer four-year or higher professional degrees. Note that the concept of "universities", however, is more universal and materials referring to "universities" generally can be indexed with HIGHER EDUCATION.

"COLLEGE" TERMS

1. Rarely use the single-word descriptors COLLEGES or UNIVERSITIES. Use a "college" or "university" term.

2. Use the descriptor HIGHER EDUCATION as a major when the state of higher education as a whole is addressed. An example is a document titled "Colleges Need to Find Solutions to Today's Problems."

3. When a relevant specific "university" descriptor cannot be found, use the closest "college" term (e.g., COLLEGE STUDENTS for "university students"). When a relevant specific "college" descriptor cannot be found, use the closest "school" descriptor (e.g., SCHOOL SECURITY for "campus security"). Note concepts that may be candidates for new "college" descriptors.

4. Use the appropriate "teacher" descriptor if the specific "faculty" descriptor is not in the Thesaurus (e.g., use TEACHER ATTITUDES for "faculty attitudes").

5. Avoid an "educational" term if a "college" term is available (e.g., use COLLEGE PLANNING rather than EDUCATIONAL PLANNING).

INSTITUTIONAL OR STUDENT TYPE

1. Always identify the type of institution as specifically as possible. Use such descriptors as BLACK COLLEGES, PRIVATE COLLEGES, STATE UNIVERSITIES, SMALL COLLEGES, RESEARCH UNIVERSITIES, URBAN UNIVERSITIES. These descriptors will usually be minor. (See COLLEGES in the Thesaurus hierarchical display.)

2. When a document identifies a specific student type, use the relevant specific descriptor(s) (e.g., MEDICAL STUDENTS, GRADUATE STUDENTS, COLLEGE TRANSFER STUDENTS, COLLEGE FRESHMEN, UNDERGRADUATE STUDENTS, etc.) and not the broad term COLLEGE STUDENTS.

FORM DESCRIPTORS

1. Use QUESTIONNAIRES (as a minor) and pubtype 160 on documents that include the actual survey instrument.

2. Include as minor descriptors such terms as CASE STUDIES, STATE SURVEYS, NATIONAL SURVEYS, SCHOOL SURVEYS, COMPARATIVE ANALYSIS, TREND ANALYSIS, FOLLOWUP STUDIES, or LONGITUDINAL STUDIES when appropriate, in order to facilitate retrieval. If a document talks in detail about how to conduct these studies, major the descriptor.

MISCELLANEOUS

1. Assign the descriptor FOREIGN COUNTRIES (minor) to documents about non-U.S. countries and populations, and an identifier (usually major) to indicate the country name. Qualify the country name with a geographic subdivision, as appropriate -- e.g., MEXICO (MONTERREY).

2. Use COURT LITIGATION for anything discussing court cases. Make a judgment call on whether LEGAL RESPONSIBILITY or a similar descriptor is needed.

3. Use SCHOOL HOLDING POWER and/or ACADEMIC PERSISTANCE for student retention. "Dropout" descriptors may or may not be relevant.

4. Use EDUCATIONAL FINANCE sparingly, only for broad discussions. Instead, refer to "financial" or "costs" descriptors. Major it even more sparingly.

5. Use the identifier PAYING FOR COLLEGE for documents on how to finance a college education.

6. Use POSTSECONDARY EDUCATION AS A FIELD OF STUDY only when the document is about master's or doctoral programs or curriculum in such areas as higher education administration or college student personnel service (also known as "student affairs"). Use of this term should be rare.

7. Descriptors must be in the ERIC Thesaurus. Identifiers must either be in the IAL or, if new, reflect the style of similar terms in the IAL (e.g., college names, court cases, etc.)

8. In the abstract, don't "translate" the author's language into descriptor terminology. The abstract is reserved for the author's own words (the actual language of the document). This gives the searcher more options for finding a concept, especially something new that hasn't evolved yet into "educationese."

IDENTIFIERS -- Refer to the Identifier Authority List (IAL).

1. Always index the following types of identifiers when they're the subjects of documents:

   -- college or university names (many HE documents have this type of identifier) -- e.g., MIAMI UNIVERSITY OH

   -- association or organization names (but don't index them if they merely prepare the report, unless it is an official position paper or similar statement)

   -- test names (e.g., GRADUATE RECORD EXAMINATIONS)

   -- geographic regions (e.g., UNITED STATES (SOUTH), CARIBBEAN).

   -- foreign country names (e.g. FRANCE; AUSTRALIA (BRISBANE)).

   Be sure to note ERIC's idiosyncrasies for Canada and the United Kingdom. Identifiers for Canada are structured by province, e.g., QUEBEC (MONTREAL). Those of the U.K. are structured under one of four geopolitical divisions, e.g., ENGLAND (LONDON); SCOTLAND (EDINBURGH); WALES (MONMOUTHSHIRE); NORTHERN IRELAND (BELFAST). Use identifiers CANADA and UNITED KINGDOM only when the topic is the entire country. Don't use GREAT BRITAIN as an identifier unless the topic is the island of Great Britain (i.e., including England, Scotland, and Wales, but excluding Northern Ireland).

   -- persons

   -- laws (enacted, not proposed)

   -- computers/computer software

- specific methods, theories, ideas, etc., not found in the Thesaurus (e.g., SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANTS; PARENT LOANS FOR UNDERGRADUATE STUDENTS; TINTO METHOD; ENVIRONMENTAL SCANNING).

- **new terms in the field, specially those being written about frequently** -- in our case, terms like CULTURAL LITERACY; PARTNERSHIPS IN EDUCATION; STRATEGIC PLANNING; LOAN DEFAULT; TUITION PREPAYMENT; PAYING FOR COLLEGE; COST CONTAINMENT

2. Sometimes unique identifiers (usually major) will be assigned to a collection of documents important to retrieve as a group. Examples are:

   - *AAUP CONTRACTS (for collective bargaining contracts collected for ERIC by the American Association of University Professors);

   - *ASHE ANNUAL MEETING (for papers presented at the conference of the Association for the Study of Higher Education, and submitted to ERIC in lieu of a published proceedings);

   These specific identifiers will be noted on the processing sheet that accompanies each document.

3. Some documents that are part of a publication series have a standard identifier. For example, the American Association of Collegiate Registrars and Admissions Officers (AACRAO) submits "country" reports that describe a foreign country's education system and that are designed to help colleges place foreign students properly in American institutions. They are indexed with the major descriptor *STUDENT PLACEMENT and two major identifiers: country name (e.g., *IRAQ) and *FOREIGN EDUCATIONAL CREDENTIALS. (This latter could become a descriptor.)

LB/5-89

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
INFORMATION RESOURCES

Prepared by

Barbara Minor

May 1989

1066

ERIC Clearinghouse on Information Resources
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Syracuse University
Syracuse, NY 13244-2340
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School of Education / School of Information Studies

SPECIAL INDEXING IN THE ERIC CLEARINGHOUSE ON INFORMATION RESOURCES

DESCRIPTORS

Computer Assisted Instruction:	UF computer-based instruction instructional uses of computers computer-based learning (Brit.)
Computer Managed Instruction:	use when the computer system is used to monitor progress, prescribe instruction, etc., but not for the delivery of instruction.
Computer Uses in Education:	use ONLY when BOTH instructional and administrative applications are involved.
Computer Oriented Programs:	we almost never use this term; we used to use it as we now use Computer Uses in Education. Note: most computer docs/articles added to ERIC in recent years concern "personal computers" or "micros," but, because such words are often not in an author's text, the indexer isn't reminded to index the term Microcomputers. We try to alert users that searches using the descriptor Microcomputers may be too restrictive and lead to unrepresentative results.
Instructional Development:	ID includes the whole process from needs assessment through the design, production, and formative and summative evaluations of instructional materials/programs.

Electronic Mail: ALANET — ALA0184; BITNET — ERIC @ SUVM

Instructional Design:	this more limited concept is concerned with the design of teaching materials and selection of appropriate teaching methods.
Educational Technology:	includes both Instructional Development and Instructional Design as well as the use of audiovisual materials, computers, programed learning, etc. We use it only for documents/articles that use the term, i.e., if there is not a more precise term (Multimedia Instruction, Audiovisual Instruction, etc.). The term Information Technology is frequently used in documents that talk about Educational Technology, and frequently, these documents wind up focusing on computers. It all gets very interesting. . .
Academic Libraries:	used for college and university libraries in general.
College Libraries:	used for a specific academic library.
Note:	the mandatory level descriptor Higher Education is used with both of these terms.
Learning Resources Centers:	this is used for library media centers in both K-12 and community/junior colleges. The appropriate level descriptor is used with the term. If School Libraries is the term used in an article or document, we use that term. Sometimes we use both. . .
Online Catalogs:	this is used in preference to Library Catalogs and Online Systems, which we used before this term graduated to descriptor status. It is also used for Online Public Access Catalogs.
Online Searching:	this is used in preference to Information Retrieval if the searching is indeed being done online. (We used to use

	Information Retrieval and Online Systems for this concept.) But Information Retrieval can be used more generally, as can Search Strategies.
Library Automation:	refers to the use of computer systems in libraries for management (e.g., circulation, statistics) as well as online catalogs. This might be the equivalent of "Computer Uses in Libraries". . .

IDENTIFIERS

Identifiers are specific indexed entities that do not appear in the ERIC Thesaurus. We always index the following types of identifiers when they're the subjects of documents (using the IAL precedents):

- Institution or association names
  (not indexed if they merely prepare a report, unless it is an official position paper or similar statement);
- College or university names;
- Persons;
- Laws
  (enacted, not proposed);
- Geographic Regions;
- Foreign country names
  (coordinated with the minor descriptor Foreign Countries--ERIC's idiosyncrasies for Canada and the U.K. are followed);
- Test names;
- Computers;
- Computer Programs;
- Specific methods, theories, ideas, etc., not found in the Thesaurus, e.g., Boolean Logic, Hawthorne Effect, Information Society, Learner Control, Screen Format, Weeding (Library);
- New terms in the field, especially those being written about frequently.

Barbara B. Minor
Publications Coordinator
ERIC/IR
March 1989

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
FOR
JUNIOR COLLEGES

Prepared by

Anita Colby

May 1989

UNIVERSITY OF CALIFORNIA, LOS ANGELES UCLA

BERKELEY · DAVIS · IRVINE · LOS ANGELES · RIVERSIDE · SAN DIEGO · SAN FRANCISCO SANTA BARBARA · SANTA CRUZ

ERIC CLEARINGHOUSE FOR JUNIOR COLLEGES
INDEXING PRACTICES

ERIC® CLEARINGHOUSE FOR JUNIOR COLLEGES
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405 HILGARD AVENUE
LOS ANGELES, CALIFORNIA 90024
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I. GENERAL

A. Number of Index Terms

1. Averages across the ERIC system are 12 for RIE documents and 10 for CIJE journal articles, including both descriptors and identifiers.
2. Index as specifically as possible while avoiding peripheral topics. Generally, citations with more than 20 descriptors deserve a second look. Consider the user's point of view by asking, "Can the specific topic(s) covered be retrieved by the assigned index terms? Would an item retrieved by the assigned index terms be relevant or useful?

B. Number of Majors

1. The maximum number of major index terms is 7, split into either of the following: 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers.
2. Narrowly focused topics may need fewer than 5 or 6 major descriptors.
3. Always assign at least 1 major descriptor.

C. Educational Level

1. For most documents, TWO YEAR COLLEGES will be assigned as the Educational Leveler.
2. Assign HIGHER EDUCATION to those documents that address articulation and transfer between two- and four-year colleges.
3. Assign POSTSECONDARY EDUCATION to documents that address short-term, non-degree, college-level education, e.g., contract courses with industry, terminal vocational education of less than two years, and community education programs. Assign also to documents addressing technical institutes and proprietary schools as well as two- and four-year colleges.
4. For documents dealing with articulation between high schools and two-year colleges, also add HIGH SCHOOLS as a leveler.

5. For two-year college programs that are not college-level, ADULT EDUCATION or ADULT BASIC EDUCATION may be more appropriate.

D. Age-Level Descriptors

1. We don't typically assign age-level descriptors.
2. We use ADULTS or ADULT LEARNING or ADULT STUDENTS (with ADULT EDUCATION or ADULT BASIC EDUCATION) on documents with major androgogical leanings.
3. Some two-year colleges operate programs for seniors (for which OLDER ADULTS, YOUNG OLD ADULTS and/or OLD OLD ADULTS is appropriate).

E. Publication Type Descriptors

1. Unless there is an exact overlap with PUBTYPE CODES, we assign publication type descriptors on a regular basis, particularly to identify study type; e.g. VOCATIONAL FOLLOWUP, GRADUATE SURVEYS, LONGITUDINAL STUDIES, PROGRAM EVALUATION, QUESTIONNAIRES, FOLLOWUP STUDIES, SCHOOL SURVEYS, COMMUNITY SURVEYS, etc. Unless the document talks in detail about how to conduct these studies, the term will be assigned as a minor descriptor. If a questionnaire is included in the document, assign 160 as PUBTYPE and assign QUESTIONNAIRES (as a minor) as a DESC.

F. Research Methodology Descriptors

1. We assign methodology descriptors if a substantial discussion of the method is included, but not if it is simply stated that a particular method is used (e.g., COHORT ANALYSIS, MULTIVARIATE ANALYSIS, etc.)

G. Population Terms

1. We index all disaggregated ethnic groups, also assigning MINORITY GROUPS or ETHNIC GROUPS, for more than three groups. ETHNIC GROUPS or MINORITY GROUPS may also be used alone if specific groups aren't delineated.
2. Our most commonly used population term is TWO YEAR COLLEGE STUDENTS. We major it and other descriptors such as STUDENT ATTITUDES, STUDENT CHARACTERISTICS, and ENROLLMENT TRENDS, if these are major variables in the document.
3. We identify the personnel group as specifically as possible (ADMINISTRATORS, COLLEGE PRESIDENTS, ACADEMIC DEANS, COLLEGE FACULTY, SCHOOL PERSONNEL.)
4. Other population characteristics that may need to be indexed are socioeconomic status, ability level, and other personal/demographic characteristics.

H. Foreign Countries

1. We assign FOREIGN COUNTRIES to every document about a country other than the U.S., adding the name of the country (and geographic subdivisions) to the IDEN field, usually as a major. We also assign DEVELOPING NATIONS and/or DEVELOPED NATIONS if the subject is national or international social and economic development.

I. Identifiers

1. We use the name of a state as a major identifier if the study/data is/are statewide.
2. We always index country names other than U.S., along with the descriptor FOREIGN COUNTRIES, when they are the subjects of documents.
3. We use the name of a school or organization as an identifier, if the school or organization that is the focus of the document is not also the INST or SPON. In cases in which the school/organization is the principal focus of the document (e.g., The History of the American Association of Community and Junior Colleges), the Association may be both INST or SPON and IDEN.
4. For laws, tests, people, regions, etc., we assign an IDEN only if a significant topic of the document.
5. Before using Descriptor-like Identifiers, we make sure that there isn't an existing descriptor that adequately covers the topic.

J. When in doubt, we check to see how a similar document has been indexed. If the possibility of scope overlap exists we pay particular attention to how other Clearinghouses have dealt with the topic.

II. SCOPE AREA

1. Institutional Setting

We identify the type of school as completely as possible

- a. Use TWO YEAR COLLEGES on most documents -- add COMMUNITY COLLEGES or TECHNICAL INSTITUTES or appropriate colleges or universities term to specify type of two-year college involved.
- b. Identify rural/urban setting; small school/ large school; multicampus setting if this is a significant aspect of the document (i.e. if the findings issues etc. are in some way unique to that type of institution)

2. Specificity

We use the most specific term available. In order of preference: "college" terms, "school" terms, "educational" terms. Don't use a "college" and an "educational" term simultaneously (e.g., use COLLEGE PLANNING rather than EDUCATIONAL PLANNING).

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
ELEMENTARY AND EARLY CHILDHOOD EDUCATION

Prepared by

Norma Howard

May 1989

1075

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ERIC/PS
IN-HOUSE INDEXING GUIDELINES

INDEXING BASICS

Checklist of important points to remember; see Indexing Section of ERIC Processing Manual or A/I Workbook for more complete information and discussion of indexing.

1. Up to 7 Major (*) index terms may be used on an RIE document or CIJE article. Must have at least 1 major Descriptor, and no more than 2 major Identifiers.

2. If 6 *Descriptors are used, only one *Identifier may be used.

3. If 5 *Descriptors are used, 2 *Identifiers may be used.

4. Descriptors and Identifiers are assigned either major or minor status, depending upon content of the document.

5. There is no limit on total numbers of Descriptors and Identifiers (just to give you a ballpark idea, average for CIJE is 10 and average for RIE is 12). Documents assigned more than 20 index terms may be over-indexed and deserve a second look.

6. Identifiers may be no longer than 50 characters, including spaces.

7. No punctuation marks such as hyphens or commas allowed in Descriptors or Identifiers. Parentheses () allowed.

8. Avoid using acronyms in Identifier field except for very widely known ones such as ERIC, UNESCO, and USSR. Spelled out versions are substituted for equivalent acronyms wherever possible. Occasionally, acronyms and other abbreviations must be used to keep within the 50-character limit.

9. Be sure to check singular or plural form of Descriptors and Identifiers-- must be entered properly or the Facility's **computer will kick it out. Improperly entered Descriptors are** deleted.Improperly entered Identifiers are flagged for editorial review; new Identifiers are also flagged.

10. The Rotated Descriptor Display is a very useful adjunct tool to the Thesaurus. Use it to find terms that have prefixes you may not think of and thus may not be able to find easily in the alphabetical display of the Thesaurus.

CAUTION: Never index from the Rotated Display by itself. It should be used only to lead you to terms in the main alphabetical Thesaurus. The Thesaurus is structured hierarchically via BTs (broader terms) and NTs (narrower terms), which help to show you how terms are used. Also, the Thesaurus gives SNs (Scope Notes) for terms, very important when deciding whether to assign them to a document or article. RTs (related terms) listed in the Thesaurus give you other important clues to terms to use.

Indexers should be aware that the main alphabetical Thesaurus only shows broader and narrower terms at the first hierarchical level. Only the Hierarchical Display provides complete hierarchies and the most specific available Descriptors.

11. Concepts to be indexed:

A. Population: groups or individuals studied or discussed (normally not majored unless they're the subjects of a document)

Types of terms that describe population--

1. **Educational (grade/academic) level**
   MUST be assigned if the document deals with it. Assign FIRST, before any other indexing is done. Major if the educational level itself is discussed,
   Examples: philosophy of, theory of, history of, important legislation concerning.
   Minor if the document concerns, but does not directly discuss,a particular educational level,
   Example: a study of peer relationships of children in a preschool classroom.
   Always use the most specific educational level term possible.
   Examples: use Elementary Education for grades K-6 (students aged approximately 5-12), Primary Education for grades K-3 (ages 5-9), Intermediate Grades for grades 4-6 (ages 9-12).
   (See list of educational levels in Thesaurus front **matter or in the Indexing Handbook.)**
2. Age
3. Occupation
4. Ethnic group (race, religion)
5. Nationality
6. Intelligence or ability level
7. Physical/emotional characteristics
8. Socioeconomic characteristics
9. Sex

B. Subject: **content of the document**

Action concepts, materials concepts, curriculum concepts, etc.
Examples: Peer Relationship, Parent Child Relationship, Social Development, Childrens Television , Individualized Instruction, Arithmetic, Spatial Ability, Exploratory

Behavior, Naturalistic Observation.

12. Publication/Document type: Assign 1 to 3 codes from the pubtype list.

This is a separate field from the Descriptor and Identifier fields. Pubtype codes may be supplemented by Descriptors (usually minor) that aren't exact repetitions of the pubtype **code wording. (see list in front of Thesaurus or front section of the Indexing Handbook.)**

Examples:

Annotated Bibliographies	(supplements Bibliographies)
Reading Tests	(supplements Tests)
Language Research	(supplements Research)

13. Target Audience: This also is a separate field. Target Audience is assigned only when the document or article explicitly directs itself to an audience. e.g., "...intended for school teachers..." Don't guess who might want to use it. Even if the article is in a journal published by a research society, teacher association, administrator organization, etc., only use the audience field when an article specifically mentions a particular audience. If not absolutely clear, leave this field blank. TA=RESEARCHERS should be used only rarely; its use can be generally restricted to documents/articles that are so esoteric that they would be of very little or no interest to other audiences.

Additional Notes:

--Index to the level of specificity of the document. Never index up unless the broader term is equally the subject of a document.

--Index what's in the document, not what you think the implications are, or who you'd like to see use it. Consider the user's point of view by asking two questions: Can the specific topic(s) covered be retrieved by the assigned index terms? Would an item retrieved by the assigned index terms be relevant or useful?

--Avoid peripheral topics, i.e., don't index everything in the document, if it's only briefly mentioned; this would give the user false expectations of the document content. Document length is one criterion for judging appropriate numbers of index terms.

--If you can't find Descriptor terms to adequately index content of the document, use Identifiers. Look first in Identifier Authority List to see if there's something there already that's near enough. If not you'll need to construct one or more new Identifiers. In constructing new Identifiers, do not make up words or use an author's terminology

indiscriminately. Use precedents established by the IAL. (An author's language is preferred over an indexer's personalized style.) Each week give secretary list of any new Identifiers you've developed and Vocabulary Coordinator has ok'd. New IDs will be added to list on disk that is printed out periodically for [illegible] use and to refer to when new Descriptors are being considered for Thesaurus.

INDEXING PRACTICES--ERIC/PS

PS indexers follow the indexing rules as set forth in the Processing Manual and clarified in Indexing Advisories.

To achieve consistency of indexing for certain indexing issues that arise regularly in documents and journal articles processed by PS, use the following guidelines:

1. When the topic is day care, use Early Childhood Education as the educational leveling term, unless the day care population is described more precisely, such as Elementary School Students (use Elementary Education leveling term), children in grades K-3 (use Primary Education leveling term), or preschool age children (use Preschool Education leveling term).

2. Primary School in British Isles, Australia and New Zealand is basically elementary education and should usually have the term Elementary Education as the educational leveler. (Avoid such paraphrasing in the abstract, however; the abstract is reserved for the author's words, i.e., the actual language of a document.)

3. Subjects of a study (e.g. Infants, Preschool Children, Elementary School Students) are assigned as majors when they are significantly discussed in the document. This is particularly important when there are no other major terms assigned that locate the level of the document contents (e.g. Childrens Television, Childhood Interests, Child Development).

4. Foreign Countries should be used as a minor Descriptor for documents about countries and populations other than the United States. (An easy way for computer searches to separate out non-U.S. documents by using NOT Foreign Countries). Additionally the name(s) of the specific country/countries (and geographic subdivisions) should be indexed in the Identifier field, e.g.:

Japan	
Alberta (Calgary)	Use "Canada" only for the whole country.
England	Use "United Kingdom" only for the entire nation. Don't use "Great Britain" unless you mean England, Scotland, and Wales, but not Northern Ireland.

Africa (Sub Saraha)	Don't use "Africa" (continent) in lieu of more specific African countries.

Geographic identifiers may be major or minor as appropriate.

Use the descriptor Developing Nations (used for "Third World"), in addition to Foreign Countries, when the subject is national or international social and economic development. Developing Nations is a socioeconomic concept and should only be used in that sense, e.g., shouldn't be used for a document on "Teaching Reading in the Sudan," unless the idea is reading for economic development, etc. The descriptor Developed Nations (i.e., industrialized countries), also a socioeconomic construct, may also be indexed along with Foreign Countries when appropriate. Developing Nations, when used, is often a major descriptor (both it and Developed Nations may, of course, be major or minor depending on the document).

5. Use the Identifier field for specific entities that cannot be covered by Thesaurus descriptors. Always index the following types of Identifiers when they're the subjects of documents (using the IAL precedents):

School names
  (public grade or high schools should not be named unless they're particularly outstanding -- instead, index the school district's name);
College or university names;
Institution or association names
  (not indexed if they merely prepare a report, unless it is an official position paper or similar statement);
Persons;
Laws
  (enacted, not proposed);
Geographic Regions;
Foreign country names
  (coordinated with the minor descriptor Foreign Countries -- ERIC's idiosyncrasies for Canada and the U.K. are noted);
Test names;
Computers;
Computer Programs;
Specific methods, theories, ideas, etc., not found in Thesaurus, e.g., Day Care Licensing, Stochastic Processes, Thinking Skills, Higher Order Skills, Child Health, Child Health Care, Reunion Behavior, Caregiver Role, Perfectionism, Parental Leave, Dreams;
New terms in the field, especially those being written about frequently.

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
RURAL EDUCATION AND SMALL SCHOOLS

Prepared by

Linda Miller

May 1989

ERIC
Clearinghouse on
Rural Education and
Small Schools
CRESS

INDEXING GUIDELINES (May 1989)

The average system-wide totals of index terms (descriptors and identifiers) per resume are 10 for CIJE and 12 for RIE. Please take a second look at any resume with more than 20 indexing terms.

The total number of major indexing terms (descriptors and identifiers) permitted per resume is 7. The total number of major identifier terms may not exceed 2. These numbers are limits--not goals. Please major only the appropriate descriptors and identifiers within these limits. Every resume must have at least one major descriptor.

GENERAL

(1) Educational Level (Assign first, before other indexing is done.)

An educational level descriptor must be assigned if the document deals with it. Always use the most specific educational level descriptor(s) possible. If necessary, more than one educational level descriptor may be assigned to a document or article, e.g., INTERMEDIATE GRADES and/or JUNIOR HIGH SCHOOLS to describe middle school populations, HIGHER EDUCATION and ELEMENTARY EDUCATION to describe preservice preparation for elementary school teachers. Education level descriptors should only be major if the level itself is the subject, e.g., philosophy of, theory of, history of, important legislation concerning.

(2) U.S. Congressional Hearings

A. Use the minor descriptor HEARINGS and the pubtype 090.
B. Use the appropriate Congressional number as an identifier, e.g.,"Congress 100th."
C. Indicate the hearing number or the committee publication number in the report number field, e.g.: House-Comm-Pub-100-639; Senate-Hrg-100-335.
D. Indicate the serial number in the note field, e.g.: Serial No. 100-436.
E. Include the Public Law if applicable, e.g.:
  o In abstract--"...Indian Self-Determination and Education Assistance Act (Public Law 93-638)...";
  o In identifiers--"Indian Self Determination Education Assistance Act"
  (note: abbreviated for 50 characters--"Public Law 93 638" is a UF in the IAL)
F. Include the House or Senate bill number, if applicable, in the title or abstract, e.g.: "S. 1703," "H.R. 1801."

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800/624-9120 (outside WV) • 800/344-6646 (in WV) • 347-0400 (Charleston area)
AEL is an affirmative action/equal opportunity employer

(3) Questionnaires

Use QUESTIONNAIRES as a minor descriptor and the pubtype 160 for documents that include the actual survey instrument.

(4) Pubtype 143

Use a minor descriptor to describe the type of research, e.g.: CASE STUDIES, FIELD STUDIES, LONGITUDINAL STUDIES, STATE SURVEYS, NATIONAL SURVEYS, SCHOOL SURVEYS, COMPARATIVE ANALYSIS, TREND ANALYSIS, FOLLOWUP STUDIES. If a document or article deals with how to conduct these studies then these descriptors should be major.

(5) Pubtype 050, 051, 052, or 055

Use a minor descriptor to describe the type of guide, e.g.: LESSON PLANS, RESOURCE MATERIALS, INSTRUCTIONAL MATERIALS, TEXTBOOKS, WORKBOOKS, FACULTY HANDBOOKS, LABORATORY MANUALS, STUDY GUIDES, TEST MANUALS.

(6) Foreign countries

Always use FOREIGN COUNTRIES as a minor descriptor for documents or articles about countries (populations included) other than the United States of America, coordinating the name(s) of the specific country/countries (and geographic subdivisions) in the identifier field. Geographic identifiers many be major or minor as appropriate.

(7) Identifiers

Do not be reluctant to use identifiers. Always index the following types of identifiers when they are the subjects of documents:

- o Institution or association names
  (do not index them if they merely prepared a report, unless
  it is an official position paper or similar statement);
- o College or university names;
- o Languages not appearing in the Thesaurus
  (see instruction 4 of scope-specific guidelines below);
- o Tribes
  (see instruction 5 of scope-specific guidelines below);
- o Persons;
- o Laws
  (enacted, not proposed);

- Geographic regions;
- Foreign country names (be sure to note ERIC's idiosyncracies for Canada and the U.K.);
- Test names;
- Computers/Computer Software;
- Specific methods, theories, ideas, etc., not found in the Thesaurus, e.g. 4 H Programs, Child Health Care, Double Bind Theory, Farm Crisis, Foxfire, Impact Aid, Outward Bound, Partnerships in Education, Twenty First Century, Wetlands, Winter;
- New terms in the field, especially those being written about frequently.

SCOPE-SPECIFIC

(1) Chicanos or Chicanas used in the document:

Use Chicanos or Chicanas (or a derivative thereof) as an identifier and a "Mexican-American" descriptor, e.g.:

DESC_Mexican Americans; Females
IDEN_Chicanas

DESC_Mexican American Education
IDEN_Chicano Arts; Chicano Studies

(2) Native Americans used in the document:

This term is not synonymous with AMERICAN INDIANS. Use Native Americans, Native American Studies, etc. in the identifier field along with the appropriate specific descriptor(s), e.g. AMERICAN INDIANS, ALASKA NATIVES, ESKIMOS, CANADA NATIVES. There are various derivatives of AMERICAN INDIANS in the Thesaurus, e.g., RESERVATION AMERICAN INDIANS, URBAN AMERICAN INDIANS, AMERICAN INDIAN HISTORY, that may be used with, or in lieu of, the broader descriptor (see rotated display). ESKIMOS has one derivative descriptor, ESKIMO ALEUT LANGUAGES.

(3) Alaska natives or Canada natives used in the document:

Use the descriptor(s) ALASKA NATIVES or CANADA NATIVES, with appropriate other "American Indian" and/or "Eskimo" descriptors for specificity. ALASKA NATIVES and ESKIMOS (or ESKIMO ALEUT LANGUAGES) may be coordinated with the identifier "Aleuts" when appropriate.

BEST COPY AVAILABLE

(4) American Indian Languages indexing:

Check first to see if the language is a Thesaurus descriptor, i.e., in the AMERICAN INDIAN LANGUAGES hierarchy. Ex.-- APACHE, CHEROKEE.

Then, look under IAL category #13. Ex-- Crow, Karuk

For new "language" identifiers, use the following authority:

> Classification and Index of the World's Languages
> by C.F. and F.M. Voegelin (Elsevier, 1977).

(5) American Indian Tribes/Reservations indexing:

Use identifiers (IAL category #08 for tribes, #17 for reservations). Ex -- Eskasoni Indian Reserve NS, Hopi (Tribe), Navajo (Nation), Nez Perce (Tribe), Pima Maricopa Reservation AZ, Pine Ridge Indian Reservation SD, Zuni (Pueblo).

Reference Encyclopedia of the American Indian, Volume 1, 4th edition (ED 283 637) is useful in identifying the proper name of tribes and/or reservations.

Federal and State Indian Reservations and Indian Trust Areas (ED 101 904) is also useful in identifying the proper names of reservations.

These guidelines will be updated as needed. Please contact Linda Miller if you have any questions or need further information.

INDEXING PRACTICES

OF THE

ERIC CLEARINGHOUSE

FOR

SCIENCE, MATHEMATICS, AND ENVIRONMENTAL EDUCATION

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
FOR
SOCIAL STUDIES/SOCIAL SCIENCE EDUCATION

Prepared by

Jane Henson

May 1989

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INDEXING PRACTICES FOLLOWED BY THE ERIC ChESS CLEARINGHOUSE

I. GENERAL PRACTICES FOLLOWED IN RIE/CIJE INDEXING

A. SOCIAL STUDIES

"Social Studies" refers to education in history and the social sciences, grades K-12. Social Studies is indexed as a major descriptor when it is the main theme or topic of a document. The term is commonly majored on elementary-level (K-6) curriculum guides, lesson plans, units of study, class activities, and similar materials that integrate subjects like geography, history, and current events together under the "social studies" label. It is more frequently minored on secondary-level materials (grades 7-12), where the individual subjects of social studies are generally presented separately.

B. GEOGRAPHY, HISTORY, ART, MUSIC, ETC.

These and other descriptors representing "subjects" taught or studied in school are majored when they are principal topics of documents. This is more frequently the case for secondary education where such subjects are usually presented in separate courses, than elementary education where they're more often sub-topics of "social studies," "art education," etc.

Care should be taken to always index to the most specific available descriptor. When appropriate, for example:

- Use Human Geography, Physical Geography, or World Geography rather than Geography;
- Use United States History, European History, Black History, etc., rather than History;
- Use Creative Art, Freehand Drawing, Handicrafts, Painting (Visual Arts), Sculpture, etc., rather than Art;
- Use Singing, Bands (Music), Jazz, Oriental Music, etc., rather than Music.

C. NUMBERS OF INDEX TERMS / MAJORS AND MINORS

Average systemwide totals of index terms (descriptors and identifiers) are 10 for CIJE and 12 for RIE.

The total number of major index terms permitted is:

6 Descriptors and 1 Identifier
or
5 Descriptors and 2 Identifiers

These numbers are not goals. Accumulations of more than 20 terms per document should be given a second look. Also, only appropriate descriptors/identifiers should be majored within the above limits; however, every document must be assigned one major descriptor.

D. POPULATION TERMS

These terms refer to the groups or individuals studied or discussed in a document. They are normally not majored unless they're the subject or an important aspect of the document. Types of terms that describe population include:

- Education level
  (must be assigned if the document deals with it; see details under item E, below);
- Age;
- Ethnic group
  (race, religion);
- Nationality;
- Intelligence or ability level;
- Physical/emotional characteristics;
- Socioeconomic characteristics;
- Sex.

E. EDUCATION (GRADE/ACADEMIC) LEVEL

Education level must be indexed if dealt with in a document. Indexers should get into the habit of assigning education levelers first, before any other indexing is done. They're minored when they describe the level at which something, i.e., the document subject, occurs (the usual case).

EX -- A report on music education for preschoolers.

They're majored only when the levels themselves are the subject.

EX -- Philosophy of, theory of, history of, important legislation concerning.

Indexers should always use the most specific educational level possible.

EX -- Use Elementary Education for grades K-6 (students aged approximately 5-12), Primary Education for grades K-3 (ages 5-9), Intermediate Grades for grades 4-6 (ages 9-12).

If appropriate, more than one level may be assigned, e.g., Intermediate Grades and/or Junior High Schools to describe middle school populations, Higher Education and Secondary Education to describe college-level professional continuing education programs for secondary school teachers.

Education levelers are often easily extrapolated from a document's content without being specifically mentioned.

EX -- "Grade 8 students" certainly gives the ed level away; Students "from X school district" is an ed level clue.

(See list of education levels in the Indexing Handbook or in the front matter of the Thesaurus.)

II. OTHER PRACTICES

A. IDENTIFIERS

Identifiers are specific indexed entities that do not appear in the ERIC Thesaurus. The following types of identifiers are always indexed (using the IAL precedents) when they're the subjects of documents:

- Institution or association names (not indexed if they merely prepare a report, unless it is an official position paper or similar statement);
- College or university names;
- Persons;
- Laws (enacted, not proposed);
- Geographic Regions;
- Foreign country names (coordinated with the minor descriptor Foreign Countries -- ERIC's idiosyncrasies for Canada and the U.K. are followed);
- Test names;
- Computers;
- Computer Programs;
- Specific methods, theories, ideas, etc., not found in Thesaurus, e.g., Bill of Rights, British Colonies, Cold War, Commemorative Events, Empowerment, Jewish Studies, Koran, Nostalgia, Perestroika, Supply Side Economics, Twenty First Century, Universal Declaration of Human Rights;
- New terms in the field, especially those being written about frequently.

For documents dealing with specific historical time periods or events, special combinations of identifiers may be used.

EX -- United States Constitution and
Bicentennial
(the descriptors Constitutional History and Constitutional Law may be used additionally, at the indexer's discretion);
Northwest Ordinance 1787 and
Bicentennial.

B. FORM DESCRIPTORS

1. When indexing research documents, care is taken to include a descriptor (minor) describing the type of study, e.g., Case Studies, Field Studies, Cross Sectional Studies, Ethnography, Longitudinal Studies, State Surveys, National Surveys, School Surveys, Comparative Analysis, Trend Analysis, Followup Studies. If a document talks in detail about how to conduct these studies, term(s) are assigned major.

2. When indexing educational practitioner documents or guides, care is taken to include a descriptor (minor) describing the type, e.g., Lesson Plans, State Curriculum Guides, Resource Materials, Units of Study, Instructional Materials, Textbooks, Workbooks, Faculty Handbooks, Laboratory Manuals, Study Guides, Test Manuals.

3. The minor descriptor Questionnaires and the pubtype code 160 are used for documents that include the actual survey instrument.

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
TEACHER EDUCATION

Prepared by

Mary Tregillus

May 1989

1084

CLEARINGHOUSE
TEACHER
EDUCATION

ERIC

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ERIC/SP IN-HOUSE GUIDE FOR INDEXING

Major and Minor Terms

Systemwide averages of index terms (descriptors and identifiers) per document/article are 10 for CIJE and 12 for RIE.

Maximum majors permitted are: 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers.

Every citation must have at least 1 major descriptor, and no more than 2 major identifiers.

Index of the most specific term; never index up to broader terms unless they're equally the subject of documents.

Index the document in hand -- don't make assumptions.

Avoid overindexing and underindexing -- consider the most significant and essential concepts of the document.

Too many minor descriptors are confusing; use the most important ideas.

Accumulations of more than 20 terms per document should be given a look.

Try to assume the searcher's point of view, i.e.,
Can the specific topic(s) covered be retrieved by the assigned index terms? Would an item retrieved by the assigned index terms be relevant or useful?

Identifiers

Identifiers are specific indexed entities that do not appear in the ERIC Thesaurus.

Do not be reluctant to use identifiers, but avoid making up words or using the author's terminology indiscriminately. Names of more than one word must follow a consistent spelling pattern, i.e., an IAL precedent.

Always index country names other than U.S.(major or minor--subdivided if appropriate), along with Foreign Countries (minor desc), when they're subjects of documents. Note ERIC's use of idiosyncrasies for Canada (use provinces) and the U.K. (use states, i.e., England, Scotland, Wales, and Northern Ireland -- avoid using "Great Britain" unless the topic is the island of Great Britain, (excludes Northern Ireland).

The following additional types of identifiers also should always be indexed when they're the subjects of documents (using the IAL precedents):
Institution or association names (not indexed if they merely prepare a report, unless it is an official position paper or similar statement; avoid indexing public school names unless they're particularly significant--instead, index the name of the school district);
College or university names;
Persons;
Laws (enacted, not proposed);
Geographic regions;
Test names and measurement techniques;
Computers;
Computer programs;
Specific methods, theories, ideas, etc., not found in the Thesaurus, e.g., Alternative Teacher Certification, Beginning Teacher Induction,

Child Health, Child Health Care, Higher Order Skills, Insulin, Musculoskeletal System, National Teacher Certification, Principal Student Relationship, Premenstrual Syndrome, Reflective Teaching, Socratic Method, Sport History, Teacher Corps, Thinking Skills.
New terms in the field, especially those being written about frequently.

Scope Terms

Preservice Teacher Education or Inservice Teacher Education should be used on all teacher education documents (if at all relevant). The other four narrower teacher education descriptors (Competency Based Teacher Education, English Teacher Education, Student Teaching, and Teacher Educator Education) are added to the indexing, as appropriate. The broad descriptor Teacher Education is used only for broad-ranging discussions or if further specificity is not provided. Teacher education descriptors are majored when they're the principal topic(s) of documents.
Physical Education, Health Education, Physical Fitness, Dance Education, Recreation (or other such term) should be used on all physical education, health, etc. scope-related documents.

Population Terms

These terms refer to the groups or individuals studied or discussed in a document. They are normally not majored unless they're the subject or an important aspect of the document. Types of terms that describe population include:

Educational level (must be assigned if the document deals with it--see discussion, below);
Age level;
Ethnic group (race, religion);
Nationality;
Intelligence or ability level;
Physical/emotional characteristics;
Socioeconomic characteristics;
Sex

Educational Level Descriptors

Must be indexed if dealt with in a document.
Indexers should acquire the habit of assigning education levelers first, before any other indexing is done.
Always use the most specific educational level possible.
EX -- Use Elementary Education for grades K-6 (students aged approximately 5-12), Primary Education for grades K-3 (ages 5-9), Intermediate Grades for grades 4-6 (ages 9-12).

Educational Level Descriptors

Minor when they describe the level at which something, i.e., the document subject, occurs (the usual case).
EX -- A report on physical fitness of high school students. Major only when the levels themselves are the subject.
EX -- Philosophy of, theory of, history of, important legislation concerning. Use specific grade descriptors, e.g., Grade 7, Grade 2, in addition to educational level descriptors.
If appropriate, more than one level may be assigned.
EX -- Intermediate Grades and/or Junior High Schools to describe middle school populations;
Higher Education and Elementary Education to describe preparation for elementary school teachers;
Higher Education and Secondary Education to describe college-level professional continuing education programs for secondary school teachers.
The second and third examples above are typical of most teacher education documents, which generally cover both the level of teacher preparation and the level of the students to be taught.

If there is no educational level, try to use an age level.
See lists of educational level descriptors and age level descriptors in Thesaurus front matter or in the Indexing Handbook.

Form Terms

Unless there is an exact overlap with Pubtype codes, care should be taken to include descriptors (minor) that describe the type of study, e.g., Case Studies, Field Studies, Cross Sectional Studies, Ethnography, Longitudinal Studies, State Surveys, National Surveys, School Surveys, Comparative Analysis, Trend Analysis, Followup Studies.
If a document talks in detail about how to conduct these studies, term(s) are assigned major.
Use Questionnaires (minor desc) and pubtype code 160 for documents that include the actual survey instrument.
See Thesaurus front matter or the Indexing Handbook for "exact overlap" descriptors and Pubtype codes.

Target Audience

Use the audience field only when the document or article explicitly directs itself to an audience, e.g., "...intended for school teachers..." Don't guess who might want to use it.
Even if the article is in a journal published by a research society, teacher association, administrator organization, etc., only use the audience field when an article specifically mentions a particular audience. If not absolutely clear, leave this field blank.

Index Terms versus Terms in the Abstract

Indexed descriptors must actually be in the ERIC Thesaurus.

Indexed identifiers must either be in the IAL or, if new, reflect the precedents established by the IAL. The abstract is reserved for the author's words, i.e., the actual language of a document. Do not purposefully substitute ERIC index terms for an author's terminology in the abstract.

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
TESTS, MEASUREMENT, AND EVALUATION

Prepared by

Ruth Christie

May 1989
(preliminary)

1089

ERIC

Educational Resources Information Center
Clearinghouse on Tests, Measurement, and Evaluation

Indexing Guidelines
Clearinghouse on Tests, Measurement, and Evaluation

(PRELIMINARY)

Indexing Basics — Descriptors and Identifiers

1. Number of Descriptors and Identifiers
   - Average of 10-12 descriptors and 1-2 identifiers
   - Maximum of 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers
   - Minimum of 1 major descriptor per document or journal article
   - Never major 2 descriptors beginning with the same word (e.g., *Test Validity; Test Reliability)
   - Provide the same level or extent of indexing for CIJE journal papers as that for RIE documents. Similarly, shorter documents and journal articles usually have fewer descriptors and identifiers than do longer documents and articles

2. Major/Minor Descriptors and Identifiers
   - Generally major:
     - Subject Populations (e.g., sample for whom test is relevant)
     - Significant Terms or Ideas Expressed in Titles
     - Programs Evaluated (e.g., *State Programs; *Testing Programs)
     - Research Methodology Discussed or Evaluated (e.g., *Multivariate Analysis)
     - Types of Tests Evaluated or Developed (e.g., *Multiple Choice Tests)
     - Test Names
   - Generally do not major:
     - Educational Level
     - Age Level
     - Document Type
     - Research Methodology Used by the Document (e.g., Comparative Analysis)
     - Very broad or general descriptors

3. Population Terms
   - Subject Populations
   - Ethnic Groups (e.g., Black Students; Hispanic Americans)
   - Age Level
   - Ability Level (e.g., Academically Gifted)
   - Socioeconomic Characteristics
   - Sex (only when major focus of document)

4. Educational Levels
   - Always use educational levels and population descriptors together for research using student populations as subjects (e.g., Elementary Education and Elementary School Students)
   - Always use educational levels and population descriptors together when document's emphasis is on teachers, school administrators, and/or school faculty members (e.g., Elementary Secondary Education and Principals)
   - Always use most specific educational level possible, and coordinate with corresponding grade levels

5. Title Terms
   - When terms in titles are the subject of a document, they are indexed and often majored

6. Tests and Measurements
   - The focus of a document or article (e.g., the test evaluated, the methodology assessed, the program or policy evaluated, the theory or model discussed, the statistical procedure presented, and the measurement technique addressed) is considered a mandatory major descriptor(s)
   - Generally, the test type, what it is testing, who it is testing, and how it was used are all ideas that are indexed for research documents studying tests and their development
   - When an assessment tool is not specifically described or identified by the author as a "test", the most appropriate descriptor is used (Questionnaires; National Surveys; Measures (Individuals); Interest Inventories). However, relevant descriptors pertaining to "tests" are coordinated (e.g., Test Reliability) in an effort to accurately describe the document
   - Avoid using the descriptor "Educational Testing". A more specific term is used in most every case
   - The test type (e.g., *Achievement Tests) and the test name (e.g., *California Achievement Tests) are usually indexed as major descriptors and identifiers, respectively
   - The descriptor "School Districts" is used when the document focuses on specific district policy, data, or personnel
   - If the name of a school district is provided in the IAL and it is the subject of the document, the IAL identifier for that school district is used. In such instances, the school district identifier is used instead of the "School Districts" descriptor

7. Evaluation
   - Types of program, school, curriculum, personnel, and statistical evaluations are indexed
   - The descriptor "Program Evaluation" is used for evaluations of programs/projects of organizations, institutions, and agencies. School-related activities (commonly referred to as "programs") are not usually indexed with this descriptor. An effort is made to use more specific terms to denote the "educational" or "school" context (e.g., Curriculum Evaluation, Educational Assessment)

8. Overindexing
   - Avoid listing numerous (more than 4 or 5) grade levels, except when the document focuses on several grade levels (e.g., test score trends for a school district for grades 1, 2, 3, 6, and 8)
   - Avoid listing a string of test names in the identifier field when the subject of a document includes a battery of tests, more than 3 or 4 tests, or tests not listed in the IAL. Tests not listed in the IAL are only used as identifiers when they are the major focus of a document and they appear in the corresponding title field. In most cases, only 1 or 2 tests will be the major focus of a single document

Descriptors

1. Form Descriptors
   - When indexing research documents, care is taken to include a descriptor (minor) denoting the type of study (e.g., Case Studies, Field Studies, Longitudinal Studies, National Surveys, State Surveys, School Surveys, Comparative Analysis, Trend Analysis). If a document discusses in detail how to conduct these studies, term(s) are assigned major
   - Pubtype and methodology index terms such as Literature Reviews are assigned minor status
   - When indexing educational practitioners documents or guides, care is taken to include a descriptor (minor) describing the type (e.g., Resource Materials, Instructional Materials, Textbooks, Workbooks, Test Manuals)

2. Miscellaneous
   - o Always use Foreign Countries as a minor descriptor for documents/journal articles about countries or subject populations other than in the United States, and coordinate with the appropriate names of countries in the identifier field. Geographic identifiers are generally minor terms
   - o Use the descriptor Developing Nations in addition to Foreign Countries when the subject is a national or international program or policy in third world countries
   - o Use the descriptor Developed Nations in addition to Foreign Countries when the subject is a national or international program or policy in non-third world countries
   - o Due to the 50-word limit for CIJE records, test names and other terms emphasized in the original journal paper may appear only in the descriptor, identifier, and/or title fields of CIJE records. Thus, terms not appearing in the CIJE abstract can appear in other fields of the record
   - o Indexed descriptors and identifiers must reflect the language of the Thesaurus and IAL, respectively. However, they must also reflect the actual language of the document or article
   - o The document or article in hand is indexed. In this sense, the indexing does not rely solely on the accompanying abstract
   - o When appropriate, use "Undergraduate Students" when specifically stated in the document. When "undergraduate" is not indicated in the document, use "College Students" or more accurate descriptors (e.g., College Freshmen)

Identifiers

1. Always index the following types of identifiers when they are the major focus of a document and use the IAL precedents:
   - Institution or Association Names
     (not indexed if they merely prepare a report, unless it is an official position paper or similar statement)
   - College or University Names
   - Persons
     (only if they are the subject of a document; do not index persons when merely their theories or research papers are discussed)
   - Enacted Laws
     (not proposed)
   - Court Cases
   - Geographic Regions
   - Foreign Country Names
   - Test Names
     (when they are the major focus of the original document and they appear in the IAL; do not list tests that merely were administered to research subjects during the course of the study and that are not the major focus of a document)
   - Computers
   - Computer Programs
   - Theories, models, evaluation methods, statistical analyses, and research methods not found in the Thesaurus
     (Cognitive Process Theory of Writing, Responsive Illuminative Evaluation, Structure Mapping, Test Developers, Writing Achievement, Evaluation Research, Symbol Systems Approach, Test Appropriateness, Measurement of Change, Hierarchical Cluster Analysis, Canonical Redundancy Statistic)
   - School Districts
     (avoid indexing public school names unless they are particularly significant; instead, index the name of the school district)
   - New terms in the field, includes tests, statistical methodology, and evaluation methodology

2. Tests, theories, statistical methodology, etc. only briefly mentioned in a document are not indexed

3. After all Thesaurus and the IAL possibilities have been exhausted and no other alternative exists except to create a new identifier, an attempt is made to use (or create) non-IAL descriptors in a standardized manner (e.g., using precedents established by the IAL). However, focus is also on using non-Thesaurus and non-IAL terms as they appear in the document or article

Target Audience

1. Use the audience field only when the document specifically states "...intended for school administrators..." If not absolutely clear, leave this field blank

Pubtype

1. For conference proceedings (021), an attempt is made to index the focus of each of the conference papers provided. As conference papers generally emphasize a specific area (e.g., program evaluation practices in third world countries), ideas are picked from the conference paper titles and usually are indexed as minor terms. The overall topic of a conference is usually indexed as a major term(s)

2. Pubtype 160 is used every time the document or article provides the actual questionnaire, survey, test, inventory, and/or assessment tool or instrument. This rule applies to tools developed primarily for the purpose of the research conducted in the document (e.g., principal surveys)

3. Pubtype 150 is used for papers presented at a conference.

INDEXING PRACTICES
OF THE
ERIC CLEARINGHOUSE
ON
URBAN EDUCATION

Prepared by

Wendy Schwartz

May 1989

ERIC / CLEARINGHOUSE ON URBAN EDUCATION

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ERIC/CUE INDEXING TIPS

re: Major and Minor Terms

1. Systemwide averages of index terms (descriptors and identifiers) per document / article are 10 for CIJE and for RIE.

2. Maximum majors permitted are: 6 major descriptors and 1 major identifier, or 5 major descriptors and 2 major identifiers.

3. Every citation must have at least 1 major descriptor, and no more than 2 major identifiers.

4. Index to the most specific term; never index up to broader terms unless they're equally the subjects of documents.

5. Index the document in hand -- don't make assumptions.

6. Avoid overindexing and underindexing -- consider the most significant and essential concepts of the document.

7. Too many minor descriptors are confusing; use the most important ideas. Listing more than 20 terms per document is probably overindexing.

8. Try to assume the searcher's point of view. Can the specific topic(s) covered be retrieved by the assigned index terms? Would an item retrieved by the assigned index terms be relevant or useful?

re: "Urban" Terms

1. Use "Urban Education," "Urban Schools," or "Urban Teaching" as a descriptor for documents about urban educational settings.

2. Use "Urban Areas," "Urban Environment," "Urban Problems," or other "urban" descriptor(s), as appropriate, for documents focusing on other aspects of urban life.

3. If an "urban" context is particularly important or significant, an assigned "urban" descriptor should be a major.

4. If the document contrasts urban and rural education/life, use the descriptor Rural Urban Differences, with other appropriate "urban" and "rural" terms.

INSTITUTE FOR URBAN AND MINORITY EDUCATION

5. If the focus is on a particular "urban" public school system, use the school district name as an identifier.

EX -- **New York City Board of Education** ,

If the particular "urban" location is focused on more generally (i.e., beyond the school system context), use the location itself as the identifier.

EX -- New York (New York)

Such identifiers are indexed in addition to appropriate "urban" (and/or "rural") descriptors. They are majored when crucial to the content of the document.

(Note: Names of specific public grade or high schools should not be indexed unless they're particularly outstanding; instead, index the school district's name.)

re: Designations of Population

1. Use descriptors to refer to the groups or individuals studied or discussed in a document. These are normally not majored unless they're the subject or an important aspect of the document.

2. Types of terms that describe population include:

- Educational level
  (must be assigned if the document deals with it -- see discussion, below);
- Age level;
- Ethnic group
  (race, religion, nationality -- see discussion, below);
- Intelligence or ability level;
- Physical/emotional characteristics;
- Socioeconomic characteristics;
- Sex.

re: Educational Level Descriptors

1. Must be indexed if dealt with in a document.

2. Indexers should acquire the habit of assigning education levelers first, before any other indexing is done.

3. Always use the most specific educational level possible.

EX -- Use Elementary Education for grades K-6 (students aged approximately 5-12), Primary Education for grades K-3 (ages 5-9), Intermediate Grades for grades 4-6 (ages 9-12).

4. Minor the term when it describes the level at which something, i.e., the document subject, occurs (the usual case).

EX -- A report on literacy among high school seniors.

5. Major it only when the level itself is the subject.
EX -- Philosophy of, theory of, history of, important legislation concerning.

6. Use Specific grade descriptors, e.g., Grade 7, Grade 2, in addition to educational level descriptors. However, avoid indexing grade ranges (e.g., Grade 7, Grade 8, and Grade 9) when they're essentially equivalent to a level (i.e., Grades 7, 8, & 9 = Junior High Schools).

7. If appropriate, more than one level may be assigned.
EX -- Intermediate Grades and/or Junior High Schools to describe middle school populations;
Higher Education and Elementary Education to describe preservice preparation for elementary school teachers.

8. If there is no educational level, try to use an age level.

9. See lists of educational level descriptors and age level descriptors in Thesaurus front matter or in the Indexing Handbook.

re: "Ethnicity" Terms

1. Use the most specific descriptor available to identify the ethnic group being studied, discussed, etc. For example, if the document is only about Puerto Ricans, use "Puerto Ricans" not Latin Americans, Ethnic Groups, or Minority Groups. If the document is about Puerto Rican children, use both "Puerto Ricans" and a "child/children" term (e.g., Child Development, Minority Group Children, Elementary School Students [but, not just Children, if at all possible]), since "Puerto Rican Children" does not exist as a descriptor.

2. If many different ethnic groups are covered, list each individually (as descriptors or identifiers - however they appear in the Thesaurus or IAL) if each is discussed separately and different points are made about each. Otherwise, use "Ethnic Groups" or "Minority Groups." These two broad terms should be indexed only as delineated by their Thesaurus scope notes, i.e.:

ETHNIC GROUPS
Subgroups within a larger cultural or social order that are distinguished from the majority and each other by their national, religious, linguistic, cultural, and sometimes racial background (Note: do not confuse with "Minority Groups," which has the connotation of being the object of prejudice or discrimination...)

MINORITY GROUPS
Subgroups within a larger society that are distinguished from the majority and each other by race, national heritage, or sometimes by religious or cultural affiliation (Note: unlike "Ethnic Groups," "Minority Groups" also have the connotation of being objects of prejudice or discrimination)

3. If the ethnic group is an identifier (e.g., Asian Blacks), also index the most specific available descriptor (e.g., Blacks). If such an identifier is majored, the corresponding descriptor should usually be minored. Another example:

> If Chicanos or Chicanas is used in the document, use "Chicanos" or "Chicanas" (or a derivative thereof) as an identifier and a "Mexican-American" descriptor, e.g.:

DESC_Mexican Americans;
Females
IDEN_Chicanas

DESC_Mexican American Education
IDEN_Chicano Arts;
Chicano Studies

4. If a document contrasts two ethnic or racial groups, or two countries, list both. Do not assume that "Whites" or "United States" is implied. Use "White Students," rather that Whites, if appropriate. Use the identifier "United States" sparingly, usually for various subdivisions (see IAL listing) or for overall comparisons with other countries (as above); otherwise, it may be implied by its absence.

5. If both sexes are discussed separately, or compared, the use of "Sex differences," "Sex Role," etc., instead of "Males" and "Females," is usually more appropriate.

6. Use "Foreign Countries" as a minor descriptor for documents/articles about countries (populations included) other than the U.S.A., coordinating the name(s) of the specific country/countries (and geographic subdivisions) in the identifier field. Geographic identifiers may be major or minor as appropriate. ERIC's idiosyncrasies for Canada (use provinces) and the U.K.(use states, i.e., England, Scotland, Wales, and Northern Ireland) should be followed -- avoid using "Great Britain" unless the topic is the island of Great Britain [excludes Northern Ireland].

7. Use the descriptor "Developing Nations" (used for Third World), in addition to "Foreign Countries," when the subject is national or international social and economic development. Developing Nations is a socioeconomic concept and should only be used in that sense, e.g., shouldn't be used for a document on "Teaching Reading in the Sudan," unless the idea is reading for economic development, etc. The descriptor "Developed Nations" (i.e., industrialized countries), also a socioeconomic construct, may also be indexed along with Foreign Countries when appropriate. Developing Nations, when used, is often a major descriptor (both it and Developed Nations may, of course, be major or minor depending on the document).

8. Keep in mind that ERIC users search for descriptors in pairs, or sets, so if a user wants information on Cambodian parents, he or she will search for the combination of "Cambodians" and "Parents." Thus, when deciding which should be major descriptors you should consider probable combinations of descriptors that will be searched. In this example, however, the most specific "parent" term should always be

indexed, not just "Parents." If the choice was "Mothers,"manual access could still be retained under "P" by co-indexing major terms like "Parent Aspiration" or "Parent Child Relationship." Of course, all "parent" terms can be searched simultaneously on a computer via truncation.

9. If a document discusses speakers of a language other than English, use:

-- (desc) Spanish Speaking, (iden) French Speaking, etc.,
OR
-- the specific language itself (desc or iden - however in the Thesaurus or IAL).
OR
-- (desc) Non English Speaking, if unspecified.

In addition, use appropriate "language" descriptor(s), including "bilingual" terms (e.g., "Limited English Speaking").

Of course, (desc) English, (iden) English Speaking, etc., are also indexed when they're the subjects of documents.

re: Form Descriptors

1. When indexing research documents, care is taken to include a descriptor (minor) describing the type of study, e.g., Case Studies, Field Studies, Cross Sectional Studies, Ethnography, Longitudinal Studies, State Surveys, National Surveys, School Surveys, Comparative Analysis, Trend Analysis, Followup Studies. If a document talks in detail about how to conduct these studies, term(s) are assigned major.

2. When indexing educational practitioner documents or guides, care is taken to include a descriptor (minor) describing the type, e.g., Lesson Plans, State Curriculum Guides, Resource Materials, Units of Study, Instructional Materials, Textbooks, Workbooks, Faculty Handbooks, Laboratory Manuals, Study Guides, Test Manuals.

3. The minor descriptor Questionnaires and the pubtype code 160 are used for documents that include the actual survey instrument.

re: Identifiers

1. Identifiers are specific indexed entities that do not appear in the ERIC Thesaurus.

2. Do not be reluctant to use identifiers, but avoid making up words or using the author's terminology indiscriminately. Names of more than one word must follow a consistent spelling pattern, i.e., an IAL precedent.

3. Always index the following types of identifiers when they're the subjects of documents (using the IAL precedents):

Institution or association names
  (not indexed if they merely prepare a report, unless it is an official position paper or similar statement; avoid indexing public school names unless they're particularly significant--instead, index the name of the school district);
College or university names;
Persons;
Laws
  (enacted, not proposed);
Geographic Regions;
Foreign country names
  (coordinated with the minor descriptor Foreign Countries--ERIC's idiosyncrasies for Canada and the U.K. are followed);
Test names;
Computers;
Computer Programs;
Specific methods, theories, ideas, etc., not found in the Thesaurus, e.g., Access to Health Care, Bush Administration, Charisma, Child Health, Cocaine, Collaboratives, Empowerment, Enlightenment Thought, Food Stamp Program, Higher Order Skills, Immigration Law, Partnerships in Education, Policy Implications, Project Head Start, Thinking Skills, West Indians;
New terms in the field, especially those being written about frequently.

NOTES

ERIC®

Processing Manual

Rules and Guidelines for the Acquisition, Selection,
and Technical Processing of Documents and Journal
Articles by the Various Components of the ERIC Network

Glossary of Terms

(with Acronym List)

June 1992

Educational Resources Information Center (ERIC)
U.S. Department of Education

Glossary of Terms

-A-

ABSTRACT

A brief (usually 200 words or less) narrative description of the subject content contained in a larger body of information (e.g., a document). Abstracts are tersely written representations of the document, avoiding non-information-bearing words, wasteful constructions, and added interpretation or criticism. There are several basic types used in the ERIC system: informative, indicative, and informative/indicative. (See also **Annotation**.)

ABSTRACT (INDICATIVE)

A summary of the nature of or kind of information contained in a larger body of information (e.g., a document). A description of or guide to the content and format of the document, written from the viewpoint of an informed, but impartial and objective reader. It reports broadly what is discussed or included in the document, in what manner the information is presented, and, if necessary, to whom the document is addressed. An indicative abstract tells you what you will find if you go to the document, but does not necessarily repeat any of the information content.

ABSTRACT (INFORMATIVE)

A summary of the important results or significant facts contained in a larger body of information (e.g., a document). A condensed version of the essential ideas of a document, containing a statement (from the viewpoint of the author) of the thesis, development or proof, and conclusions. An informative abstract attempts to state what the document actually says, to actually convey substantive information, and to some extent substitute for the entire document itself, rather than to simply indicate what one can find in the document if one goes to it.

ABSTRACT (INFORMATIVE/INDICATIVE)

An abstract containing a mix of approaches, including informative information (direct transmission of author's ideas) and indicative information (abstractor's description of what the reader will find in the document). This type of abstract must be carefully constructed so as not to confuse the reader as to the viewpoint being expressed (i.e., author's or abstractor's).

ACCESS ERIC

A support contractor component of the ERIC system dedicated especially to outreach, marketing, publicity, and public relations. ACCESS ERIC began in May 1989, with award of a contract to Aspen Systems Corporation.

ACCESSION

An item selected for a collection or database and put through the processing steps to be incorporated in that collection or database.

ACCESSION NUMBER

A number (or number with alpha prefix) assigned sequentially to incoming items (e.g., documents) to uniquely identify them. Clearinghouses assign a Clearinghouse Accession Number (e.g., TM 000 123) for temporary in-process control. Upon publication in RIE or CIJE, each document is assigned a permanent systemwide accession number (e.g., ED 123 456 or EJ 123 456).

ACQUISITIONS

With reference to a *function*: the critical first step in building a library collection or database. This activity includes acquiring books, documents, and other such material by a library or information center, through purchase, gift, or exchange. Acquisitions provides the raw material for the following functions: selection, processing (cataloging, indexing, abstracting), announcement, retrieval, and dissemination. All ERIC components play a role in acquisitions efforts.

With reference to *materials*: the books, documents, journals, and other such material acquired by a library or information center, through purchase, gift, or exchange.

ACQUISITIONS ARRANGEMENT

An agreement with a document-producing organization for the automatic receipt of all (or a relevant portion) of their document output. The receiving organization is, in effect, placed on the distribution or mailing list of the producing organization and therefore need not make individual requests for every document of interest. (See also ***ERIC Acquisitions Arrangements***.)

***ACQUISITIONS DATA REPORT* (ADR)**

An online file and a monthly reference publication (produced by the ERIC Facility on the basis of regular input received from the Clearinghouses), containing the titles of all documents acquired by the Clearinghouses, over a given period of time, for possible announcement in RIE. Used for duplicate checking of in-process materials.

ACRONYM

A word formed from the initial letters of a name, e.g., *ERIC* (Educational Resources Information Center).

ADD DATE

On a computerized record, the date the record was added to the file; usually expressed as a Julian date.

ADJUNCT CLEARINGHOUSE

An organization having a special interest in a topic within a regular ERIC Clearinghouse's scope and willing to affiliate itself with that Clearinghouse, at no cost to ERIC, for the purpose of improving bibliographic control over the literature in the special interest area.

ADR (See *ACQUISITIONS DATA REPORT* (ADR))

ADVISORY BOARD

A group of specialists, in areas pertinent to the scope of a given Clearinghouse, selected by that Clearinghouse as resource persons to advise them on various matters, e.g., desirable Clearinghouse products.

AGE LEVELERS (See LEVELING DESCRIPTORS)

ALPHABETICAL DISPLAY (IDENTIFIERS)

The primary arrangement of the *Identifier Authority List* (IAL). All approved Identifiers are listed word-by-word, along with category codes, postings counts, Scope Notes (definitions) where appropriate, and references from nonpreferred terminology. (A second IAL arrangement is the **Category Display**.)

ALPHABETICAL DISPLAY (*THESAURUS*)

The primary arrangement or format of the *Thesaurus of ERIC Descriptors* (secondary arrangements are the Rotated Display, the Hierarchical Display, and the Descriptor Group Display). All valid Descriptors (Main Terms), invalid Descriptors (*dead* terms), and USE references appear in this display interfiled alphabetically word-by-word, together with definitions, cross-reference structures, and postings. It is the only display containing the complete record of every *Thesaurus* term.

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ANALYTIC

A part of a larger document that is being treated and processed as if it were a separate document; the part is *analyzed out* of the parent document.

ANNOTATION

A brief (no more than 50 words) notation of subject content. In the ERIC system annotations are written for journal articles (CIJE accessions) whose titles are not sufficient to adequately convey their content. (See also **Abstract.**)

ASCII

An acronym for American Standard Code for Information Interchange. A code for representing characters as binary numbers; used on most microcomputers.

AUTHORITY LIST

A controlled list of approved forms. A *Thesaurus* is an authority list of vocabulary terms. A *source directory* is an authority list of organizational/corporate/institutional names. In information systems, data being entered into a given field must frequently be in a form contained in an authority list before it will be permitted into the database.

AVAILABILITY

Documents announced in RIE must be available either through EDRS (Level 1 or 2) or through an outside source whose name and address can be cited in the Availability Field (Level 3). Some documents may be available both from EDRS and from some outside source. (See also **Levels (1, 2, and 3).**)

-B-

BATCH PROCESSING

A procedure in which a number of transactions to be processed are accumulated and processed together. Usually they are sorted into order and matched sequentially against affected files. Batches are usually queued to be run and delivered at some future date.

BEST COPY AVAILABLE

A statement stamped on a document selected for inclusion in the ERIC system but containing physical defects (e.g., missing pages, type below 6-point, illegible pages). After all remedies to correct the defects have been exhausted, the document cover is stamped "BEST COPY AVAILABLE" and usually entered at Level 2 (microfiche only).

BIBLIOGRAPHIES

Lists of materials relating to a particular subject, author, or period. Bibliographies may cite books, films, and multimedia materials and may or may not contain annotations or abstracts.

BIT

A contraction of the term *binary digit*. (See also **Byte.**)

BLANKET RELEASE

A Reproduction Release (permission to reproduce) granted for all or for a class of publications produced by a document source. Obviates the time-consuming need to seek individual releases for each title received from that source.

BOOLEAN ALGEBRA

A system for symbolizing logical statements by operators, usually **AND**, **OR**, and **NOT**, from which relationships among statements can then be derived mechanically. Boolean Algebra is an algebra of classes and is considered a branch of symbolic logic. The notation permits the expression of conditional statements and statements of fact in symbolic form, and by means of prescribed operations allows arrival at valid conclusions. It is much in use in information retrieval to express the conditions of a computer search. It is named after the mathematician George Boole (1815-1864).

BRIEF MATERIALS

Those documents of five or fewer pages, with the text containing 1,500 words or less. Short documents can create problems relating to user expectations and their entry into RIE should be kept to a minimum.

BROADER TERM (BT)

A *Thesaurus* cross-reference used to indicate hierarchical relationships among Descriptors. Broader terms are Descriptors representing conceptual classes that totally contain concepts represented by other Descriptors. For example, **MATHEMATICS** is considered to be a **BT** of **ALGEBRA**. Each BT is an indexable concept and the mandatory reciprocal of a *Narrower Term*. The BT/NT relationship is the same as that between a genus and its member species.

BYTE

Loosely, a specified number of binary digits. Generally used to refer to the amount of memory space needed to store one character, normally 8 bits. A computer with 8-bit bytes can distinguish $2^8=256$ different characters. The amounts of computer memory and storage are usually given in *kilobytes* (1,024 bytes) or *megabytes* (1,048,576 bytes). Two code systems used by computers to represent characters as binary numbers are **ASCII** and **EBCDIC** (see those entries).

-C-

CAMERA-READY COPY

Artwork, typed or composed text, etc., that is ready to be photographed for reproduction without further alteration.

CATALOGING (DESCRIPTIVE)

The description of a documentary entity from a physical and bibliographic point of view, as distinguished from subject cataloging. Standard library-type cataloging picks up such data elements as author, title, publisher, number of pages, etc., and displays them on a 3 X 5 card or equivalent medium for patrons and users.

CATALOGING (SUBJECT) (See INDEXING)

CATEGORY DISPLAY

One of two arrangements or formats of the *Identifier Authority List* (IAL) (the other being the *Alphabetical Display*). The display groups each Identifier into one of 20 broad categories, e.g., *Personal Names*. The specific arrangement is by category followed by alphabetic arrays of Identifiers assigned to each.

CATHODE RAY TUBE (CRT)

A vacuum tube capable of generating an image on a surface by the effect of a stream of electrons upon a layer of phosphor. The television receiver and the computer monitor are examples.

CD-ROM

Acronym for Compact Disk Read-Only Memory, a computer-storage medium. CD-ROMs are aluminum disks with plastic coatings about 4½ inches wide in which pits representing binary code are etched in the surface. A laser player can be used to retrieve the stored data. The user can "read only," i.e., data on the disk cannot be added to or altered. CD-ROM disks have the capacity of roughly 600 megabytes (10-50 times as much data as can be stored on a typical hard disk, or a thousand times as much as can be stored on a typical 5¼-inch floppy disk).

SilverPlatter was the first commercial vendor, in 1986, to offer the ERIC database on CD-ROM. DIALOG followed with their ERIC CD-ROM product the following year.

CENTRAL ERIC

The organizational unit within the U.S. Department of Education, Office of Educational Research and Improvement (OERI), responsible for the ERIC network, its budgeting, funding, planning, program development, monitoring, policy setting, etc. All ERIC components (e.g., ERIC Facility, EDRS, Clearinghouses, ACCESS ERIC, CIJE Publisher, etc.) report to Central ERIC.

CHANGE DATE

On a computerized record, the date the record was last added to or changed; usually expressed as a Julian date.

CIJE PUBLISHER

Commercial printing organization responsible for publishing *Current Index to Journals in Education* (CIJE), the *Thesaurus of ERIC Descriptors*, and annual cumulations of *Resources in Education* (RIE). Oryx Press (Phoenix, Arizona) has been the CIJE publisher since 1979. The previous CIJE publisher was Macmillan Information (New York, New York). (See also ***Current Index to Journals in Education*** **(CIJE)**.)

CITATION INDEX

A form of index to the literature that lists for a given article all subsequent articles referring to it.

CLEARINGHOUSE

A contractor within the ERIC network that takes responsibility for the acquisition and processing of materials in one of the major areas of the field of education, e.g., *Higher Education*, *Languages*, *Tests*, etc. ERIC Clearinghouses have traditionally been located within non-profit institutions such as universities; the exact number (now at 16) varies with the shifting needs of the educational community. An ERIC Clearinghouse has responsibility within the network for acquiring the significant educational literature within its particular scope; selecting the highest quality and most relevant material; processing (i.e., cataloging, indexing, abstracting) the selected items for input to the database; providing reference and retrieval services; developing information analysis products; conducting workshops and making presentations; and generating other types of communication links within the educational community. (See also **Adjunct Clearinghouse**.)

CLEARINGHOUSE ACCESSION LOG SHEET

A log sheet enclosed with every shipment of documents sent from an ERIC Clearinghouse to the ERIC Facility. The log sheet lists the documents contained in the shipment, identifying their Level status, and whether they are Clearinghouse-generated publications (for highlighting).

CLEARINGHOUSE ACCESSION NUMBER

Each Clearinghouse in the ERIC system is identified by a two-letter alpha prefix (see **Clearinghouse Prefix**). This prefix, together with a six-digit sequentially assigned number forms a preliminary Clearinghouse accession number. Temporarily, up to the time they are announced in RIE or CIJE, all documents (and associated paperwork) are identified and referred to by such numbers. Upon publication in RIE or CIJE, each document is assigned a permanent systemwide accession number (e.g., ED 123 456 or EJ 123 456).

CLEARINGHOUSE PREFIX

A two-letter code assigned to each ERIC Clearinghouse for easy identification. The codes are used as prefixes for the temporary Clearinghouse accession numbers. The following codes are currently in use: CE, CG, CS, EA, EC, FL, HE, IR, JC, PS, RC , SE, SO, SP, TM, and UD. The following codes have been used in the past: AC, AL, EF, EM, LI, RE, TE, VT.

CLEARINGHOUSE PUBLICATIONS

Clearinghouse-produced publications, including monographs, research reviews, digests summarizing given topics, state-of-the-art papers, guides to a field or to the literature of a field, etc.

CLEARINGHOUSE SCOPE OF INTEREST GUIDE

A reference tool that describes and defines the specific subject areas of responsibility of each ERIC Clearinghouse.

CODEN

A 5-character identification code for periodical titles. Developed by the American Society for Testing and Materials (ASTM), and currently maintained by Chemical Abstracts Service. The coden for the *Journal of the American Society for Information Science* is **AISJB6**. (See also **International Standard Serial Number** (ISSN).)

COLLATE

The process of merging two or more similarly sequenced files of data.

COLLATION

A statement of the extent of a document in pages or volumes, size, and important illustrative matter.

COMPACT DISKS (See **OPTICAL MEDIA**)

COMPLIMENTARY MICROFICHE

Microfiche copies of contributed documents, returned to authors/sources as a "thank-you" and as an inducement for future contributions.

CONCEPTS (ACTION)

Index terms that identify the action or activity used in an educational application. *Examples are*: instruction, testing, and experiments.

CONCEPTS (CURRICULUM)

Index terms that refer to the educational subject being administered, taught, or measured. *Examples are*: arithmetic, history, learning disabilities, reading, spatial ability, etc.

CONCEPTS (DOCUMENT FORM/TYPE)

Index terms used to describe the "document-type" characteristics of items in the database, as well as their subject. *Examples are*: instructional materials, hearings, case studies, position papers, questionnaires. Document-type Descriptors are supplementary to codes cataloged in the **Publication Type (PUBTYPE)** (q.v.) field.

CONCEPTS (LEVELERS) (See **LEVELING DESCRIPTORS**)

CONCEPTS (MATERIALS)

Index terms that identify the materials or methodology used in an educational application. *Examples are*: language laboratories, objective tests, and filmstrips.

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CONCEPTS (POPULATION)

Index terms that categorize and identify the group or individual studied by a document or intended as the users of the document. Most important to ERIC users are terms identifying the population's educational (grade/academic) level and age level (see **Leveling Descriptors**). However, other categories that may be applicable are occupation, race or nationality, religion, intelligence or ability level, physical or emotional characteristics, socioeconomic characteristics, and sex.

CONTRACT/GRANT NUMBER INDEX

A listing of all the contract and grant numbers appearing in the Contract Number and Grant Number fields of documents announced in RIE, together with the accession numbers of the reports to which they apply. Not currently a scheduled product.

CONTRACT NUMBER

The alphanumeric or numeric identifier assigned by a sponsoring agency to identify a given contract. Unlike grants, which are often less specifically defined, contracts usually carefully specify tasks or deliverable items, and the contracting agency monitors the effort and follows up to see that contractual obligations are met. (See also **Grant Number.**)

COORDINATE INDEXING

The assignment to a document (or other entity to be indexed) of unitized index terms that are meant to be put together (i.e., coordinated) at the time of retrieval in order to form the more complex concepts involved in the user's inquiry. So called because the searcher must coordinate the index terms when the search is conducted in order to arrive at the desired result.

COPYRIGHT

Literally, the right to copy, given by law in each country to the author or creator of the thing copyrighted. The laws vary in their details, but the objective is to stimulate invention, literary creativity, and publishing via the concept of *intellectual property* which can be bought and sold. In the United States, the new Copyright Law (as of January 1978) no longer requires formal registration at the Copyright Office of the thing protected.

COPYRIGHT REVISION LAW (PL 94-553)

A law passed in 1977, that revised the old (1909) copyright law, provided new definitions of concepts, such as Fair Use, and established new regulations and procedures for copyright. The net effect of the law on ERIC is that effective January 1, 1978, ERIC is required to assume that all private sector documents, whether carrying a copyright notice or not, are copyrighted, unless such documents were published without a copyright notice prior to January 1, 1978. For this reason, unless ERIC already has blanket reproduction permission from the source organization, a signed formal reproduction release form must be obtained for every title selected for the ERIC system. The existence of an *ad hoc* letter of transmittal giving ERIC permission to reproduce the report is not sufficient.

CORE JOURNAL

A journal that concentrates its articles and features in one subject area, e.g., Physics, Education, Photography, etc., as contrasted to the occasional inclusion of material of interest to that area. A core journal in education would be the *Journal of Experimental Education*; a non-core journal in education would be *Scientific American*.

CORPORATE MATERIALS

Corporate Materials refers to classroom materials produced by industry (e.g., Kodak, McDonald's, Kellogg, General Motors, J.C. Penney, etc.), trade associations, and public utilities. Corporate materials are generally inexpensive or even free. Environment, energy, and nutrition are common topics. Most materials treat the company's area of business, e.g., Kellogg publishes materials which are food-related, etc. Care must be taken in the selection of corporate materials to avoid those that exist primarily for advertising or public relations purposes.

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COSATI

An acronym for the Committee on Scientific and Technical Information. Now defunct. While in existence, it developed several information processing standards.

COST EFFECTIVENESS

A measure of performance used for the evaluation of systems. It is usually expressed as a ratio of some measure of cost to some measure of performance. The higher the performance and the lower the cost, the better the cost effectiveness of the system.

CRT (See **CATHODE RAY TUBE (CRT)**)

***CURRENT INDEX TO JOURNALS IN EDUCATION* (CIJE)**

A paperbound monthly (12 issues per year) index journal that announces journal articles from over 700 education and education-related journals. CIJE is made up of a main entry section, consisting of cataloging and indexing information and (optionally) 50-word annotations; an index section, consisting of separate subject and author indexes; and a journal contents section arranged by journal name and showing the articles accessioned from each journal issue. Semiannual cumulations are available. Each issue announces approximately 1,500 items and is available on subscription from the CIJE Publisher.

CIJE entries constitute one of two major subfiles of the ERIC database, the other being Resources in Education (RIE). CIJE entries have EJ accession numbers, while RIE citations have ED numbers.

***CURRENT PROJECT INFORMATION* (CPI)**

A U.S. Office of Education (USOE) publication (now defunct) listing and indexing ongoing projects supported by USOE contracts and grants. Projects were assigned EP accession numbers and were handled very much as documents even though many of the data elements and indexes were necessarily different. For several years, EP records were announced and indexed in a special section of *Resources in Education* (RIE). Later, the equivalent NIE publication was entitled *Educational Research in Progress*.

-D-

DATA ELEMENT

A specific, well-defined piece of information forming part of a larger record (such as a bibliographic description) and having a unique functional relationship with the content of the document to which the record refers. *Examples are*: title, author name, report number, etc. Usually synonymous with **field** (q.v.).

DATA ENTRY

The conversion/reduction of data from eye-readable form to machine-readable form. All ERIC bibliographic data must go through a data entry process to permit subsequent editing and computer processing. ERIC has used punched paper tape and optical character recognition (OCR) techniques in the past and is currently using online data transmission.

DATABASE

A file of data, usually in machine-readable form.

DESCRIPTIVE CATALOGING (See **CATALOGING (DESCRIPTIVE)**)

DESCRIPTOR AND IDENTIFIER USAGE REPORT

An alphabetic array of every index term, together with a complete list of all accession numbers that have been indexed by the term, and including a count of how many accessions are listed. Provided currently on microfiche by EDRS for the *ED/RIE* subfile only.

DESCRIPTOR GROUP DISPLAY

One of four arrangements or formats of the *Thesaurus of ERIC Descriptors* (the others being the Alphabetical Display, the Rotated Display, and the Hierarchical Display). This display arranges each of the Descriptors in the *Thesaurus* into one (and only one) of 41 broad categories, e.g., *Equipment*. The display shows each of these categories together with alphabetic arrays of the terms that have been assigned to each. (See also **Group Codes.**)

DESCRIPTOR JUSTIFICATION FORM (DJF)

The original *Thesaurus* input form. Discontinued in 1980 and replaced by the **Vocabulary Development Form** (q.v.).

DESCRIPTORS

Meaningful conceptual terms or short phrases that can be selected from a defined and controlled vocabulary for the purpose of describing/characterizing/indexing the subject content of a document, text, or other data. (See also **Main Term** and entries under **"Concepts..."**.)

DESCRIPTORS (DEAD/INVALID)

Terms that once were valid Descriptors, but that have been deliberately removed from the usable terms in the *Thesaurus*. Unlike *transferred* Descriptors, postings for invalid Descriptors remain in the ERIC files. *Dead term* status puts a *hold* on former Descriptors, preventing their further use in indexing and allowing them to be set aside for examination and possible reindexing at a later date.

DESCRIPTORS (TRANSFERRED)

Former indexable or main terms that have been downgraded to the status of **Used For (UF)** terms. Former Descriptors displayed as UFs are no longer carried in the ERIC files; their postings have been transferred to the preferred USE terms(s). This excludes transfers after December 1980 (when the last reload of the ERIC database by the major vendors occurred); all *transferred* Descriptors that are still searchable are listed in the published editions of the *Thesaurus* (see Table of Contents and find "Transferred Descriptors").

DIGESTS (See **ERIC DIGESTS**)

DIRECT ACCESS

The process of obtaining data from the memory or storage of a computer by going directly to its location, usually as specified by an address, without reading any other data. Contrasted with sequential or linear access.

DISCLAIMER LABEL (See **POLICY DISCLAIMER LABEL**)

DISSERTATION ABSTRACTS

An abstract journal (produced by University Microfilms International) that announces the majority of domestic doctoral dissertations.

DOCUMENT

A generic term referring to any printed form in which a written or graphic work may be produced. Encompasses reports, speeches, journal articles, dissertations, brochures, pamphlets, proceedings, books, and many other bibliographic forms.

DOCUMENT PREPARATION

Clearinghouse preparation of a document for filming by EDRS, e.g., retyping of illegible pages, relabeling a colored graph so as to make it independent of color, filling in window covers, etc.

DOCUMENT TRANSFER FORM

The form that records the transfer of a document from one Clearinghouse to another (usually because the subject matter is more appropriate for the receiving Clearinghouse).

DOCUMENTS IN PROCESS (DIP) SYSTEM
A microcomputer system in use by the ERIC Facility Acquisitions Department that records basic information about every document passing through the Facility's hands on the way to the Clearinghouses.

DUPLICATE CHECKING
The process of determining whether a document in hand has previously entered the ERIC system. If the answer is *Yes*, there are three possibilities: the document has already been announced; it is "in process," but not yet announced; or it has been rejected (discarded or retained exclusively for local files). Potential duplicates can be identified by computer checks, but the final determination must usually be made by a human editor.

-E-

EBCDIC
An acronym for Extended Binary Coded Decimal Interchange Code. The principal code used by IBM mainframes and minicomputers.

ED NUMBER
ED is an acronym for ERIC Document. ED accession numbers identify documents announced in *Resources in Education* (RIE). They are assigned automatically to documents by the ERIC computer system as one of the last steps in computer processing. This action is delayed so that all duplicates, rejects, and other removals can be accomplished before final accessioning takes place, thus eliminating numeric gaps. Documents are ordered by the public from EDRS by using the ED number.

EDITING (RIE and EDO)
Used to refer to the review by the ERIC Facility of the RIE and EDO document processing functions performed by the ERIC Clearinghouses (cataloging, abstracting, indexing). Ensures completeness, accuracy, and conformity to the conventions of the *ERIC Processing Manual* of data originally exhibiting an inevitable variability by virtue of being submitted from 16 remote sites.

EDITING (CIJE)
Function performed by the CIJE Publisher.

EDO (See **ERIC DIGESTS ONLINE (EDO) FILE**)

EDRS
An acronym for ERIC Document Reproduction Service. EDRS is the document supply and distribution component of the ERIC network and is responsible for the microfiching of all documents, the handling of standing orders (subscriptions) for microfiche, and the handling of on-demand orders for both microfiche and paper copy. EDRS receives documents (Level 1 and 2) and data for this purpose from the ERIC Facility. The current contractor is Cincinnati Bell Information Systems (CBIS) Federal. Previous contractors were Computer Microfilm International Corporation, Bell & Howell, National Cash Register, and Leasco Information Products.

EDUCATIONAL LEVELERS (See **LEVELING DESCRIPTORS**)

EJ NUMBER
EJ is an acronym for ERIC Journal. EJ accession numbers identify journal articles announced in *Current Index to Journals in Education* (CIJE). EJ numbers are useful (but not essential) for ordering reprints from article reprint sources such as University Microfilms International (UMI).

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ERIC

An acronym standing for **E**ducational **R**esources **I**nformation **C**enter. A decentralized network of organizations whose primary goal is bibliographic control over the domestic literature of education. Components are: (1) Central ERIC (the Government sponsor and monitor); (2) ERIC Clearinghouses (16 nonprofit contractors); (3) Support Contractors, (a) ERIC Facility--editing, computer processing, (b) ERIC Document Reproduction Service--microfilming, document reproduction; (c) CIJE Publisher--commercial publishing, and (d) ACCESS ERIC--outreach.

ERIC ABSTRACTOR/INDEXER WORKBOOK

An instructional guide for new ERIC abstractors and indexers. It supplements the *ERIC Processing Manual* by providing a set of exercises illustrating and reinforcing the basic principles of ERIC abstracting and indexing.

ERIC ACQUISITIONS ARRANGEMENTS (EAA)

A systemwide list of all Clearinghouse and Facility acquisitions arrangements. Entries cite the name of the organization, date of contact, level of reproduction release, authorization, authorizing person, and any additional explanatory notes. The list includes all organizations whose materials are regularly and routinely acquired by ERIC and its use helps to prevent duplicate acquisitions efforts and to facilitate the exchange of release forms. (See also **Acquisitions Arrangement**.)

ERIC ADMINISTRATIVE BULLETIN **(EAB)**

A bimonthly "house organ" of the ERIC system, containing news from all components, directions from Central ERIC, vendor announcements, and other related ERIC news and information. Prepared by the ERIC Facility on the basis of contributions from all components.

ERIC CHARACTER SET

The alphabetic characters (upper and lower case), numeric characters, and special characters permissible in the ERIC database.

ERIC CLEARINGHOUSE (See CLEARINGHOUSE)

ERIC CLEARINGHOUSE SCOPE OF INTEREST GUIDE

A guide that provides a complete description of each Clearinghouse's area of coverage and lists (mini-thesauri) of those Descriptors most frequently used by each Clearinghouse.

ERIC CONFERENCE CALENDAR

Originally, a list of all the conferences in which Clearinghouses planned to participate during the upcoming calendar year, including those from which papers would be solicited. The purpose of the list was to coordinate conference participation and conference-related acquisitions efforts. Expanded by ACCESS ERIC in 1990 to include all education-related conferences.

ERIC DIGESTS

Short reports (1000-1500 words, on one or two pages) on topics of prime current interest in education; designed to provide an overview of information on a given topic, plus references to items providing more detailed information; targeted specifically for practitioners with limited time for information gathering and research.

ERIC DIGESTS ONLINE (EDO) FILE

A database containing ERIC bibliographic records for selected ERIC digests, to which have been appended the full-text of the digests themselves.

ERIC DOCUMENT REPRODUCIBILITY GUIDELINES

A publication (produced by the ERIC Facility) intended to be used as a guide to determine the acceptability of documents for microfilming in terms of their paper color, ink color, paper type, type size, photographs, under-oversized pages, and other strictly physical factors.

ERIC DOCUMENT REPRODUCTION SERVICE (See EDRS)

ERIC FACILITY (See ERIC PROCESSING AND REFERENCE FACILITY)

ERIC INDEXING HANDBOOK

A guide compiled in 1989 by the ERIC Technical Steering Committee containing summaries of in-house, scope-specific indexing practices (ERIC Clearinghouse-by-ERIC Clearinghouse), as well as a general list of important indexing reminders. Now incorporated as an appendix of *ERIC Processing Manual* Section VII "Indexing."

ERIC INTERNATIONAL (See INTERNATIONAL ERIC)

ERIC NETWORK DIRECTORY

This publication provides complete mailing addresses, telephone numbers, and staff names and titles for all ERIC network components.

ERIC PARTNERS

Organizations enlisted by the ERIC Clearinghouses to aid in the process of disseminating ERIC information and to help provide documents and user feedback for the benefit of the ERIC system. In return, ERIC Partners receive timely information and reduced rates on certain products.

ERIC PROCESSING AND REFERENCE FACILITY

A centralized information processing facility serving all components of the ERIC network under the policy direction of Central ERIC. It accepts data from the ERIC Clearinghouses, edits and keys the data, and builds, maintains, and produces various products from the database. A wide variety of supporting functions are also performed, e.g., acquisitions, lexicography, data conversion, reference, tape distribution, forms control, scheduling, etc.

ERIC SYSTEM DOCUMENTATION

The written documentation that describes the software (computer programs) that create the ERIC database, its authority lists, and the products created from it.

ERIC TECHNICAL MEETINGS

Meetings held once or twice a year in which selected technical personnel of the ERIC Clearinghouses (abstractors, indexers, user services coordinators) meet to discuss current issues and resolve technical problems.

ERIC TECHNICAL STEERING COMMITTEE

Group of 6-10 ERIC technical staff persons responsible for overseeing ERIC technical operations, including ERIC technical meetings, and recommending related policy matters to Central ERIC. Members meet 3-4 times a year. The membership includes a Clearinghouse chair, 3-4 additional staff from different Clearinghouses, technical representatives of the Support Contractors, and a Central ERIC monitor.

ERICTAPES

The commercial "brand" name used for the ERIC database in machine-readable form.

ERICTOOLS

The commercial "brand" name used for the ERIC internal reference publications (e.g., *Source Directory, RIE Title Index*) when sold to outside users.

EVALUATION

In the ERIC environment, **Selection** (the process of selecting items for RIE) is distinguished from **Evaluation** (the process of determining how well an item achieves its stated objectives). ERIC selects documents for its database, but does not attempt to evaluate the accuracy, rigor, experimental design, validity of conclusions, etc., of the items selected. Evaluation is left to the community of educational practitioners and other users.

EXCHANGES
The trading of one organization's publications for those of another; a variation of automatic distribution. ERIC sometimes offers a complimentary subscription to RIE in exchange for the publications of a given prolific organization. Generally a *quid pro quo* must be demonstrated to justify the arrangement.

EXHAUSTIVITY
A measure of the extent to which all the distinct subjects discussed in a particular document are recognized in the indexing operation and translated into the language of the system. Also, a measure of the extent to which a search is a comprehensive and complete state, retrieving the given topic from all angles.

-F-

FACILITY (See **ERIC PROCESSING AND REFERENCE FACILITY**)

FALSE DROP
An irrelevant retrieval or "hit" based on an unintended coordination of index terms; synonymous with "noise."

FIELD (See **DATA ELEMENT**)

FIELD READER
A consultant hired by the Department of Education to read and evaluate proposals and make recommendations as to whether they should be funded.

FREE TEXT
The natural narrative language used by authors, which should also be used by abstractors when creating abstracts or annotations. The free or uncontrolled language of fields like the abstract or title may be contrasted to the controlled indexing vocabulary of Descriptors and Identifiers. Modern computer retrieval systems permit retrieval from either fields controlled by authority lists (such as thesauri) or from free-text fields. Since the appearance of a word in free text may or may not have a significant relation to subject content, searching based on free text tends to retrieve a certain amount of low relevance material. (Compare **Full Text.**)

FUGITIVE LITERATURE
Unpublished, limited distribution material that is produced in limited quantities. Examples would be research reports, speeches, presentations, etc. Fugitive material has a tendency to disperse rapidly and to be unavailable within a relatively short time after it is generated. It varies widely in quality. If quality fugitive literature is to be made available for the benefit of potential users (other than the small group of initial recipients), it must be captured and controlled by one of the database systems such as ERIC.

FULL TEXT
The entire document, journal article, book, or other publication, as distinct from its compressed representation in a bibliographic record or abstract. (See also **Free Text**).

-G-

GENERIC STRUCTURING

The organizing of Descriptors into "hierarchical families." A hierarchical family is made up of a class or category of concepts and each of its members. The relationship between class and members is the same as that between a thing and its types, or, in zoological terms, a genus and its constituent species. The class or genus corresponds to a "Broader Term" and the members or species correspond to the "Narrower Terms" under the Broad Term.

GOVERNMENT PRINTING OFFICE (GPO)

The agency responsible for printing most Federal Government publications. Relates to ERIC primarily by virtue of being the printer and subscription agent for RIE.

GPO DOCUMENTS

Documents printed by GPO do not require a copyright or reproduction release. They are assumed to have been generated with Federal Government funding under terms that either place them in the public domain or else reserve a free right of reproduction for U.S. Government purposes.

GRANT NUMBER

An alphanumeric tag representing the instrument through which financial support was given the work or activity reported in a document. Unlike the "contract," which is usually specifically defined, the scope of work of a grant is more general and usually does not have lists of specific tasks and deliverables. (See also **Contract Number.**)

"GRAY" LITERATURE (See FUGITIVE LITERATURE)

GROUP CODES

These 3-digit codes refer to the placement of each *Thesaurus* Descriptor in one of 41 (52 prior to the 1977-1980 Vocabulary Improvement Project) Descriptor Groups. These groups are broad subject categories that provide an overview of the *Thesaurus* vocabulary. They are used for general browsing and searching.

-H-

HARD COPY (See PAPER COPY)

HIERARCHICAL DISPLAY

One of four arrangements or formats of the *Thesaurus of ERIC Descriptors* (the others being the Alphabetical Display, the Rotated Display, and the Descriptor Group Display). This display presents sets of generic trees showing, for every *Thesaurus* Descriptor, the trail of narrower terms below it and broader terms above it, each carried to the farthest extreme.

HIT

A record (in a database) that is retrieved in the course of a search.

HOLOGRAPHS

Handwritten documents.

-I-

IAL (See ***IDENTIFIER AUTHORITY LIST*** **(IAL)**)

IDENTIFIERS

Semicontrolled retrieval terms intended to add a depth to indexing that is not always possible with Descriptors alone. An Identifier is usually the name of a specific entity e.g., project, person, place, organization, test, group, item of equipment, piece of legislation. An Identifier may also be a new concept, under consideration for Descriptor status and awaiting approval for admission to a formally controlled vocabulary or thesaurus.

IDENTIFIER AUTHORITY LIST **(IAL)**

A list of approved ERIC Identifiers (alphabetical and by category).

INDEX TERMS (See **"CONCEPTS..."** entries, and also **DESCRIPTORS** and **IDENTIFIERS**)

INDEXING

The process of assigning words or terms to documents in order to describe their subject content for purposes of subsequent retrieval. (See also **Coordinate Indexing**.)

INDICATIVE ABSTRACT (See **ABSTRACT (INDICATIVE)**)

INFORMATION ANALYSIS PRODUCTS (IAPs) (See **CLEARINGHOUSE PUBLICATIONS**)

INFORMATIVE ABSTRACT (See **ABSTRACT (INFORMATIVE)**)

INFORMATIVE/INDICATIVE ABSTRACT (See **ABSTRACT (INFORMATIVE/INDICATIVE)**)

INTERCHANGE

A newsletter, containing news of interest to ERIC users of all types. Published 1972-1988 by the ERIC Facility, and 1990 to present by ACCESS ERIC. Once quarterly, it is currently issued twice a year.

INTERNATIONAL ERIC

Informally, InterEd. A long-term initiative for international cooperation among the major English-language education-related databases. It involves representatives from the Australian Education Index (AEI), the British Education Index (BEI), the Canadian Education Index (CEI), and ERIC. The New Zealand Council for Educational Research (NZCER), at an earlier stage of development, participates informally. Members presently interact in one another's ongoing vocabulary development work (the ERIC *Thesaurus* has served as a model for the vocabularies of the other files). A long-term goal is to provide a searchable AEI/BEI/CEI/ERIC "superfile," consisting of independent but closely associated databases.

InterED (See **INTERNATIONAL ERIC**)

INTERNET

A large "network of networks," consisting of many regional networks (e.g., SuraNet, PrepNet, etc.) interconnected via the TCP/IP communications protocol. TCP/IP is an acronym for Transport Control Protocol/Interface Program. (See also **National Research and Education Network (NREN)**.)

INTERNATIONAL STANDARD BOOK NUMBER (ISBN)

A unique identifying number assigned by publishers to each distinct book, monograph, or other nonserial item that they sell. The format of the number is determined by international (ISO-2108) and national (Z39.21) standards. Each publisher obtains a publisher-specific number from their respective national ISBN Agency (R.R. Bowker in the U.S.). A typical ISBN number is ISBN-0-394-57327-7, with 0 being the group (of countries) identifier, 394 the publisher identifier, 57327 the title identifier, and 7 the check digit. The English-speaking countries use the group identifiers 0 and 1.

INTERNATIONAL STANDARD SERIAL NUMBER (ISSN)

A unique identifying number assigned by the International Serials Data System (ISDS) to each distinct serial publication. In the United States, the National Serials Data Program (NSDP) at the Library of Congress represents the ISDS. The format is based on international (ISO-3297) and national (Z39.9) standards. Publishers wishing to have an ISSN either submit an application form or send a current issue of their publication to NSDP. A typical ISSN consists of eight digits in arabic numerals 0-9, except for the last or check digit which can be an "X". The numbers appear as two groups of four digits, e.g., "ISSN-1234-5679."

-J-

JOURNAL ARTICLES

Generic term referring to independent writings appearing in journals and other serial publications, e.g., newsletters.

JOURNAL CONTENTS INDEX

An index in *Current Index to Journals in Education* (CIJE) that lists alphabetically each journal issue, and the articles within it, covered by that issue of CIJE.

JOURNALS (EDUCATION)

Journals concerned exclusively with one or more aspects of the field of education. They require regular monitoring by the ERIC Clearinghouses and usually comprehensive coverage in CIJE.

JOURNALS (EDUCATION-RELATED)

Journals that regularly and frequently contain articles bearing on education, but whose main focus is elsewhere. They require regular monitoring by the ERIC Clearinghouses and usually selective coverage in CIJE.

JOURNALS (NON-EDUCATION)

Journals that occasionally, but infrequently, contain an education-related article. They are not covered regularly in CIJE and education-related articles found in them are handled as "oneshot articles" (q.v.).

-K-

K-12

Kindergarten through the 12th grade.

KEYWORD

(1) an index term, representing the subject matter of a given document, e.g., "calculus";
(2) a tag identifying a data field and preceding the contents of that field, e.g., "TITLE_".

-L-

LANDSCAPE PAGES

Pages of text with the information recorded parallel to the long dimension rather than parallel to the short dimension. Contrasted to a "right-reading" standard page. Landscape pages, when microfiched in the right-reading position, extend across two normal microfiche frame areas.

LEGIBILITY

The quality of the printing in a particular document. Poor quality, which will not reproduce plainly, is often referred to as "marginal legibility." Documents that are predominantly of poor legibility should not be selected for the ERIC system. Documents with only a few poor quality pages may be processed at Level 2, i.e., microfiche only, with the title page marked "**BEST AVAILABLE COPY.**" The purpose of restricting such documents to Level 2 is to avoid having EDRS customers paying paper copy reproduction prices for poor quality or unreadable pages.

LEVELING DESCRIPTORS

Select groups of *Thesaurus* Descriptors especially designated for database partitioning purposes. ERIC has two groups of leveling Descriptors, the *mandatory educational levelers* and the *age levelers.* There are 14 mandatory educational levelers (PRESCHOOL EDUCATION, ELEMENTARY SECONDARY EDUCATION, and HIGHER EDUCATION among them). One or more educational-level Descriptors must be indexed to every ERIC citation, unless such action is deemed totally inappropriate. There are 15 age levelers (e.g., INFANTS, CHILDREN, ADOLESCENTS, ADULTS, OLDER ADULTS), explicitly defined to years of age, and used as optional indexing points on citations concerned strictly with age-level groups or populations. Educational-level Descriptors, as mandatory terms, always have precedence over the age-level Descriptors.

LEVELS (1, 2, AND 3)

Documents are announced in RIE at one of three possible levels:

Level 1: Documents are available in both microfiche and paper copy from EDRS.

Level 2: Documents are available only in microfiche from EDRS.

Level 3: Documents are not available from EDRS, but an alternate source of availability is cited in the RIE announcement.

LEXICOGRAPHY

The principles and practices of dictionary making. In information systems, frequently used to refer to the principles and practices of thesaurus making and indexing vocabulary development and maintenance.

LINE IMAGE DATA SET (LIDS)

The preliminary computerized file, of bibliographic data, which serves as a "scratchpad" for editors and proofreaders working on *Resources in Education* (RIE). Data in LIDS may be corrected on a line basis (rather than a field basis). When the editors are satisfied with the correctness of the data in LIDS, it is "released" to the ERIC Master File, assigned final accession numbers, and subsequently processed by computer into an issue of RIE.

LINK

An additional symbol (e.g., "c") attached to an index term (or to a document number being posted to an index term) that ties together related terms and separates terms that are not related. The purpose of a link is to avoid incorrect coordination (false drops) at retrieval by demanding that only linked terms be coordinated to produce "hits." Links are not employed in the ERIC indexing system.

LINOTRON

A high-speed CRT-type photocomposition device operating off magnetic tape input; manufactured by the Mergenthaler Linotype Company. Formerly in use at a few very high volume installations, e.g., U.S. Government Printing Office (GPO).

LOGICAL OPERATORS (See BOOLEAN ALGEBRA)

-M-

MACHINE-READABLE DATA FILE (MRDF)

A body of data not in printed form, but rather in magnetic, optical, or other form that can be easily read by a computer. ERIC announces education-related data files (PUBTYPE 102) as long as they are available from third parties.

MACMILLAN INFORMATION

The contractor which produced *Current Index to Journals in Education* from 1969 through February 1979.

MAGNETIC TAPE

A long strip (typically 1 inch wide by 2400 feet long) of magnetizable plastic tape used for storing data. Usually data are stored and retrieved using sequential scan access.

MAIN TERM

Main terms are the preferred, postable terms in a thesaurus; they are used to index and search (i.e., describe and retrieve), in a consistent manner, the subject content of materials entered in an information system. The concepts "main term" and "Descriptor" are equivalent when used in the sense of controlled thesaurus vocabularies.

MAJOR TERM

A Descriptor or Identifier representing one of the major concepts contained in a bibliographic citation. Major terms appear in the published subject indexes; all other indexing terms are, by definition, "Minor." In order to restrict the size of the published indexes of RIE and CIJE, no more than five (5) major Descriptors and two (2) major Identifiers or six (6) major Descriptors and one (1) major Identifier, may be assigned to any citation. A Descriptor or Identifier is Major or Minor only in the context of the particular citations where it is being used (i.e., it is not inherently major or minor).

MASTERS ABSTRACTS

A publication produced by University Microfilms International (UMI) that announces domestic Masters theses (and research papers from fifth-year programs).

MATHEMATICAL MODEL

A description of something in symbolic form in such a way that it can be formally manipulated and results derived without direct reference to the thing being modeled. Any scientific theory expressed as a set of equations is a mathematical model, for example.

MICROFICHE

A 4" x 6" (105mm x 148mm) flat sheet of film, containing reduced images of document pages. ERIC prepares microfiche for all Level 1 and 2 documents announced in RIE, using the COSATI/NMA standard (24X reduction; 98 frames in a 7x14 grid). Microfiche may be made of silver, diazo, or vesicular film. A microfiche reader or reader-printer is required to read the page images. Only the data on the header strip of the microfiche (containing accession number, title, author, etc.) are eye-legible.

MICROFICHE INVENTORY AND QUALITY CONTROL CHECK
The process of inspecting an archival set of microfiche frame-by-frame to detect filming and legibility errors. Formerly performed monthly by the ERIC Facility.

MINOR TERM
A Descriptor or Identifier assigned to a citation and appearing in the printed Resume and in the machine record, but not in the published subject indexes.

MNEMONIC
Used to refer to any device or technique intended to assist the memory of a person.

MONOGRAPH
A book, treatise, pamphlet, or other document on a single specific subject. Usually scholarly and comprehensive in nature and focused on a limited area which it covers in depth.

-N-

NARROWER TERM (NT)
A *Thesaurus* cross-reference used to indicate hierarchical relationships among Descriptors. Narrower terms represent concepts totally included within a broader conceptual class (represented by another Descriptor, a BT). For example, **ALGEBRA** is considered an NT of **MATHEMATICS**. Because they are Descriptors, Nts are indexable and searchable. The indexable NT achieves ERIC's goal of "subject-specific" indexing. Its mandatory reciprocal is the BT or "Broader Term." The BT/NT relationship is the same as that between a genus and its member species.

NATIONAL ASSESSMENT OF EDUCATIONAL PROGRESS (NAEP)
A large, formal effort, funded by the Federal Government, to determine the progress made in the United States in the teaching of various skills and disciplines (e.g., Reading, Mathematics, Citizenship), as measured by student abilities at different points in time. Currently headquartered at the Educational Testing Service (ETS). Considered by most to be the definitive source of information on whether American students are improving or getting worse in their comprehension of a subject.

NATIONAL DIFFUSION NETWORK (NDN)
An OERI-supported project to assist schools in improving their educational practices through the adoption of existing exemplary education programs.

NATIONAL INSTITUTE OF EDUCATION (NIE)
Created by Congress in 1972 and given responsibility for the conduct of federally-funded educational research. Modeled on the National Institutes of Health (NIH). Replaced by the Office of Educational Research and Improvement (OERI) in November 1985.

NATIONAL RESEARCH AND EDUCATION NETWORK (NREN)
Federal project authorized by the High Performance Computing Act of 1991 designed to expand and enhance the existing U.S. "Internet" and to create a national electronic "information superhighway" to link the country's researchers, educators, and students. (See **Internet.**)

NATIONAL TECHNICAL INFORMATION SERVICE (NTIS)

A major technical report processing center located within the Department of Commerce. Concentrates on the physical sciences. Publishes *Government Reports Announcements & Index* (GRA&I). Mandated by law to function like a business, realizing its own revenues and seeking to be self-supporting.

NATIONAL TECHNICAL MEETINGS (See **ERIC TECHNICAL MEETINGS**)

NATURAL LANGUAGE (See **FREE TEXT**)

NOISE (See **FALSE DROP**)

-O-

OERI (See **OFFICE OF EDUCATIONAL RESEARCH AND IMPROVEMENT (OERI)**)

OFFICE OF EDUCATION (OE)

Formerly the major education agency of the Federal Government. Merged into the Department of Education in May 1980.

OFFICE OF EDUCATIONAL RESEARCH AND IMPROVEMENT (OERI)

An Office of the U.S. Department of Education (ED) and sponsoring agency for the Educational Resources Information Center (ERIC). Succeeded the National Institute of Education (NIE) in November 1985.

"ONESHOT" JOURNAL ARTICLES

An education-related article found in a journal not normally covered by CIJE. "Oneshots" meet ERIC's selection criteria, but are contrasted with articles from regularly covered journals. Journals providing oneshot articles do not appear in the ***Source Journal Index*** (q.v.).

ONLINE

An "online" function is performed with the user in direct contact with the computer, interacting in real time. Contrasted to "offline," where the user submits the job into a queue to be run (and delivered) at some future date.

ONLINE VENDORS

Organizations that maintain databases and related software on their computer systems and sell online retrieval time to clients at multiple remote locations. The online vendors presently providing access to ERIC are DIALOG and BRS Information Technologies.

OPTICAL CHARACTER RECOGNITION (OCR)

The reading of typed or handwritten characters by machine and the transfer of this information to magnetic tape, disk, or other form of storage. Reliable reading devices (scanners) usually require that the characters be written in a standardized typeface, e.g., OCR-A.

OPTICAL MEDIA

Very high volume, non-magnetic storage media that employ laser-generated holes, spots, or areas of differential reflectivity to encode data/information. Examples: laser disks, CD-ROM, etc. (See also **CD-ROM.**)

ORYX PRESS

A commercial printer located in Phoenix, Arizona. Has been the CIJE and ERIC *Thesaurus* publisher since 1979. (See also **CIJE Publisher.**)

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OVERHEAD (ACCOUNTING)

Those real costs that cannot easily be attributed directly to specific elements of work and that must, therefore, be allocated equally across all tasks. Example: rent, lights, heat, etc. Overhead, General and Administrative (G&A) Costs, and Fringe Benefit Costs are sometimes grouped under the heading of "indirect costs."

OVERSIZE

Any page with dimensions exceeding the "standard" 8½" x 11".

-P-

PAGINATION

In the ERIC environment, refers to the number stamping of each page (or part of a page) that will become a separate frame on the final microfiche. Performed according to filming constraints and not according to conventional library practice. The ERIC pagination number represents the number of microfiche frames required to record the comment. Used together with the level information to programmatically generate an EDRS price code.

PAPER COPY (PC)

A paper reproduction in standard 8½" x 11" format of an original document. All Level 1 documents announced in RIE are available from EDRS in paper copy. (Formerly referred to as "Hard Copy.")

PARTNERS (See **ERIC PARTNERS**)

POLICY DISCLAIMER LABEL

A standard label that must appear on every document announced in ERIC (i.e., Levels 1 and 2), which states that the opinions expressed in the document are not necessarily those of the U.S. Department of Education. Its purpose is to make it clear that ERIC collects documents from a variety of sources and that those documents do not necessarily reflect official Department of Education policy or position.

POST-COORDINATED TERM

A concept that is "put together" at retrieval time (i.e., post or after the indexing process) through the coordination of two or more separate terms. For example, the concept "Italian Speakers," which does not exist in the *Thesaurus* as a term per se, can be sought via the post-coordination of the two separate existing terms ITALIAN and NATIVE SPEAKERS.

POST-PUBLICATION CHANGE

A change made to the ERIC database *after* the production of the monthly abstract journals, microfiche, and database tapes going to vendors and other subscribers. (Section X of the EPM covers procedures for such changes.)

POSTING

To record. A document accession number can be "posted" (i.e., recorded) on a list of similar numbers that have all been indexed by the same term. Accession numbers are, therefore, sometimes referred to as "postings."

PRE-COORDINATED TERM

An entry in a thesaurus or vocabulary that is made up of more than one word and that represents a complex concept consisting of two or more unit concepts. For example, the unit concepts "Teachers" and "Attitudes" can be pre-coordinated into the complex concept "Teacher Attitudes." Pre-coordination refers to the fact that the terms or concepts are already put together in the vocabulary, "pre-" the indexing or searching process. Pre-coordination is often justified on the basis of the prevalence of the complex concept in the given system.

PRICE CODE

A code assigned to an RIE accession that can be translated into its Microfiche or Paper Copy price if purchased from the ERIC Document Reproduction Service (EDRS), e.g., "MF01/PC01." An up-to-date translation table appears in every issue of RIE. By omitting actual prices in its database, ERIC avoids the need to update the entire backfile every time there is a price change.

PRINTOUT

A printed record produced by a computer. The paper on which the printing is done may be of virtually any size up to and including the 11" x 15" standard size computer paper.

PRIORITY DOCUMENT

A document designated by Central ERIC, the ERIC Facility, or a Clearinghouse as requiring expedited processing (i.e., entry into the next available issue of RIE) because of its significance to education and, sometimes, high visibility in the media (usually an OERI or Department of Education publication). Documents so designated by Central ERIC are mandatory input (the Facility Acquisitions Department coordinates all Central ERIC PRIORITY documents). Usually all questions of copyright, clearance, or reproducibility are resolved before transmittal to the Clearinghouses, in order to expedite processing. PRIORITY processing typically has a 5-10 day turnaround, although, on occasion, a shorter time may be required.

PROGRAM AREA CODE

A data element that attempted to code (two-character number code) documents by the legislation under which they were funded. Made inactive in 1982 due to the general lack of such information on documents.

PROJECT NUMBER

An identifying number assigned by an organization to a project. Not to be confused with a "Report Number" (which is assigned to a specific document, of which there may be several generated on a given project), or a Contract or Grant Number (which is an identification of the legal contractual instrument between two organizations). A valid ERIC data element for the period 1966-1981. Made inactive in 1982 due to infrequent usage in the literature.

PUBLIC DOMAIN

Unprotected by copyright or patent; belonging to the community at large; subject to appropriation by anyone.

PUBLICATION DATE

The calendar date that a written work is promulgated to its public. Usually considered to coincide with the date printed on the work and the date the work was printed, though in actuality there may be some variance between these.

PUBLICATION TYPE (PUBTYPE)

A data element intended to characterize the form of the document (e.g., journal article, dissertation, speech, etc.), as contrasted to its subject matter. Thirty-eight (38) types are distinguished in the present ERIC scheme.

-R-

READER-PRINTER

A device to read microfiche or microfilm that has the additional capability of producing standard paper copies of individual page frames.

READY REFERENCE

A series of one- or two-page quick reference sheets developed by the ERIC Facility, covering basic ERIC information and statistics. Through 1991, 16 have been developed. Many are revised annually. Examples: ERIC Fact Sheet; Sample Resume (with call-outs); Accession Ranges (by year), etc.

RECALL

The number of documents/accessions retrieved in a search that are relevant to the original question, divided by the total relevant documents/accessions in the database/file searched. A ratio used as a measure of the extent to which the search detected all possible good "hits."

REFILMING

A document that was faulty when originally filmed, or that was filmed incorrectly, may need to be refilmed and redistributed. Refilmings caused by EDRS error are EDRS's responsibility. Refilmings caused by Clearinghouse or Facility error are done at extra cost and must be individually approved by Central ERIC.

RELATED TERM (RT)

A *Thesaurus* cross-reference used to indicate any close conceptual relationship among Descriptors *other than* the direct class/subclass relationship described by Broader Terms and Narrower Terms. Related terms may be close in meaning, may have the same Broader Term, may be related in usage or application, may have a part-whole relationship, and so on. An RT reciprocal is another RT.

RELEVANCE

The number of documents/accessions retrieved in a search that are relevant to the original question, divided by the total documents/accessions retrieved. A ratio used as a measure of the extent to which the output of a search is on target and contains solely good "hits." Synonymous with "precision."

In selection, the extent to which the document deals with issues that are current, "alive," and of contemporary interest to the educational community.

REMOVE LIST

A report listing all documents submitted by Clearinghouses for RIE announcement, but removed prior to publication. Reasons for removal may be: duplicate, author request, legibility problems, incomplete, lack of reproduction release, not within selection criteria, etc.

REPLY CARDS

Pre-printed 3 X 5 cards for acknowledging ERIC database contributions. They are provided in quantity to regular contributors, who attach them to documents sent to the Facility or the Clearinghouses. The cards are returned to the contributors with information as to the disposition of the documents, including ED numbers for those added to the database. The cards are used to acknowledge irregular contributors, as well.

REPORT NUMBER INDEX

An alphanumeric listing of all report numbers appearing in the Report Number field of documents announced in RIE. Not currently a scheduled product.

REPRODUCIBILITY (See **LEGIBILITY** and ***ERIC DOCUMENT REPRODUCIBILITY GUIDELINES***)

REPRODUCTION RELEASE

A waiver or statement from a document author, source, or copyright holder giving permission to ERIC to reproduce the document. If both paper copy and microfiche reproductions may be made, the release is described as Level 1; if only microfiche may be made, the release is called Level 2. Reproduction releases are kept on file at the individual Clearinghouses that obtain them. (See also **Blanket Release**.)

***RESOURCES IN EDUCATION* (RIE)**

A paperbound monthly (12 issues per year) abstract journal that announces documents dealing with all aspects of education, e.g., research reports, program descriptions, instructional materials, etc. Approximately 13,000 documents are announced annually. RIE consists of a resume section of document abstracts and index sections consisting of separate Subject, Author, Institution, and Publication Type indexes. Paperbound semiannual indexes are printed by GPO, which functions as the printer and subscription agent for RIE. An annual hardbound cumulation of both resumes and indexes is available from the CIJE publisher.

RIE entries constitute one of two major subfiles of the ERIC database, the other being **Current Index to Journals in Education** (CIJE). RIE entries have ED accession numbers, while CIJE citations have EJ numbers.

RESUME

A compressed document description including cataloging, indexing, and abstracting data; a surrogate for the document itself. The term resume is used for this concept within the ERIC system; other systems describe their basic record variously as an abstract, digest, precis, brief description, announcement, record, etc.

RIE (See ***RESOURCES IN EDUCATION***)

RIE TITLE INDEX (See ***TITLE INDEX***)

ROLE

An additional symbol (e.g., "9") attached to an index term (or to a document number being posted to an index term) to designate the functional sense in which it was used in a particular document. Roles are not employed in the ERIC Indexing Systems.

ROTATED DISPLAY

One of four arrangements of formats of the *Thesaurus of ERIC Descriptors* (the others being the Alphabetical Display, the Hierarchical Display, and the Descriptor Group Display). This display provides a permuted alphabetical index of all words that form *Thesaurus* terms, whether Descriptors or USE references. Each separate word is considered as a filing unit, and a term appears in as many locations in this display as it contains separate words.

-S-

SCATTERING

Refers to the "scattering" of indexing information caused by the use of variant word forms for the same concept. For example, use of both the terms "Performance Contracts" and "Performance Contracting" would scatter information better brought together under one preferred term.

SCOPE OF INTEREST

ERIC's scope of interest is "education," in the broadest sense. Under that umbrella, each ERIC Clearinghouse has a more specialized scope of interest, e.g., Teacher Education, Languages and Linguistics, etc. The scope of interest of each ERIC Clearinghouse is delimited in the ERIC Clearinghouse Scope of Interest Guide (Appendix A to the EPM). The combination of the ERIC Clearinghouse scope of interest statements may be the best available definition of the overall field of "education."

SCOPE NOTE (SN)

A brief note explaining the intended usage of a Descriptor or Identifier. Used to restrict usage or to clarify concepts that may have alternative meanings. Not intended as formal definitions, Scope Notes indicate how terms are (or should be) used in indexing. Scope Notes appear in the main Alphabetical Displays of both the *Thesaurus* and the *Identifier Authority List*.

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SCOPE OVERLAP LABEL

A label affixed by the ERIC Facility to the cover of a document when the document overlaps the areas of interest of two or more Clearinghouses. Copies of the cover are then sent to the alternative Clearinghouse(s) to alert them to the fact that a document of interest to them has been assigned to another Clearinghouse.

SCREENING (See **SELECTION (OF DOCUMENTS)**)

SEARCH

A systematic attempt to identify documents with some well-defined characteristics. Applies to both manual and computer retrieval efforts.

SEARCH STRATEGY

The logic of a particular inquiry; the demands that a search makes on its potential output. A search strategy is usually exemplified by a series of index terms arranged in groups and interconnected by logical operators, e.g., ((HEALTH CARE COSTS) AND ((PREGNANCY) OR (PREGNANT STUDENTS)). A record in a data set must meet the specifications of a search strategy in order to be an output of the search. Search strategies may be "tight" and geared for retrieval of a small number of highly relevant items, or they may be "loose" and geared for comprehensive output of anything that even touches on the subject.

SELECTION (OF DOCUMENTS)

The process by which documents and journal articles are selected for addition to the ERIC database and announcement in the monthly ERIC abstract journals. Selection is done on the basis of type of document, legibility, size, quality, redundancy, and other factors. The complete set of criteria used for selection are provided in the *ERIC Processing Manual*. (See also **Evaluation.**)

SELECTIVE DISSEMINATION OF INFORMATION (SDI)

Alerting organizations or individuals to the existence of documents that deal with their areas of special interest. Usually based on a database or group of databases that are searched regularly, conforming to their update schedule. The search for any one client/user is based on a "profile" of that user.

SET

Any group of things having some characteristic in common, e.g., the set of documents issued by the National Bureau of Standards.

SINGLE FRAME RESUME (SFR)

A record of data (cataloging, indexing, abstracting) collected for a document, as it appears in RIE. Printed on one page (i.e., frame). Usually a computer printout. The ERIC Facility provides EDRS with SFRs for each document to be filmed; these appear on the microfiche on the Page 1 frame preceding the cover or title page.

SITE VISIT

A visit to Clearinghouses by Central ERIC personnel. At least one official site visit is made annually in connection with performance review and evaluation.

SIX-POINT TYPE

The smallest size type acceptable to ERIC for microfilming purposes. [Example: This is six-point type.]

SKELETONIZED RECORD

A record that has been found to be a duplicate of another record and that is therefore reduced in content solely to accession number, title, and cross-reference to its replacement (in order to prevent retrievals).

SOURCE CODE

A code representing an institution (e.g., a corporate source, a sponsoring agency). The ERIC Source Code is an 8-character alphanumeric code (3 alpha, 5 numeric). Information systems frequently make use of source codes because of the length of organizational names and the opportunities they provide to make small errors in spacing, punctuation, spelling, etc. [Example: BBB12345]

SOURCE DIRECTORY

An authority list of organizational/corporate/institutional names, citing the preferred form of each name. ERIC follows the COSATI (q.v.) guidelines for establishing organizational names. Issued in a "Complete Edition," as well as a "Truncated Edition" covering names established/used during the preceding 5 years.

SOURCE JOURNAL INDEX

A list of the journals covered by *Current Index to Journals in Education* (CIJE). Each journal is identified as to publisher name and address, frequency, price, reprint availability, ERIC Clearinghouse responsible for it, whether it is covered comprehensively or selectively, and, whenever possible, the ISSN number. Arranged separately by journal title and by responsible Clearinghouse. ERIC Clearinghouses nominate additions to the list. The CIJE publisher maintains the list and prints it in each issue of CIJE.

SPECIAL CHARACTER

Any of the non-alphabetic, non-numeric characters used in a particular type font or printing device. Examples of special characters would be $? ! # * . ERIC makes use of a total of 26 special characters.

SPONSORING AGENCY

The organization that sponsored (and paid for) the work reported in a given document. To be distinguished from the organization actually doing the work.

STANDING ORDER CUSTOMERS (SOCs)

Subscribers to the ERIC microfiche collection. Subscriptions are on an annual basis and cost around $2,200 for some 12,600 titles (17,500 individual fiche cards), shipped to subscribers in monthly increments corresponding to the monthly issues of *Resources in Education* (RIE).

STANDING ORDERS

Subscriptions for all the publications (or relevant classes of publications) produced by a given source. EDRS sells standing orders to the ERIC microfiche.

STATE-OF-THE-ART PAPER/REVIEW

A synthesis and integration of the level of knowledge and expertise achieved by a particular scientific or technical activity, e.g., "the state-of-the-art in computer assisted-instruction." Summaries of this type are periodically necessary in many fields. A compete review of the literature on a subject is often an important part of the state-of-the-art study.

STEERING COMMITTEE (See **ERIC TECHNICAL STEERING COMMITTEE**)

SUBJECT CATALOGING (See **INDEXING**)

SUBJECT HEADING

In traditional library practice, a member of a controlled vocabulary of alphabetical index terms. Subject Headings tend toward pre-coordination and may be made more specific by "dashed" subdivisions, e.g., Japan—History.

SUBROUTINE

A program designed to perform a well-defined, usually limited task and capable of being used as part of other programs when that task is required.

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SYSTEMS ANALYSIS

The process of determining the objectives of a system and of defining the components, operations, and procedures by which it either achieves those objectives or could achieve them more efficiently. It thus involves four steps: (1) definition of objectives; (2) analysis of processes; (3) design of alternatives; (4) evaluation.

-T-

TARGET AUDIENCE

The audience that the author/creator of a document is aiming for. Must be explicitly stated in the document in order to be cataloged; must not be a matter of subjective speculation. ERIC defines eleven target audiences, e.g., teachers, parents, counselors, etc.

TECHNICAL MEETINGS (See ERIC TECHNICAL MEETINGS)

TECHNICAL STEERING COMMITTEE (See ERIC TECHNICAL STEERING COMMITTEE)

TERMINAL

A device for communication with a computer. Terminals physically close to the computer may be connected via direct cable. Terminals physically remote from the computer are connected via communications facilities. Personal computers are often used as terminals on larger computers.

THESAURUS

A collection of words or terms. In the fields of library/information science, the thesaurus is used to classify, index, store, and retrieve information in a data bank. Thesaurus terms serve as labels; they are keywords or elements that are descriptive of the text or data being indexed. Thesaurus terms may be listed alphabetically, or they may be structured into hierarchies, specialized fields, or other sub-areas. A list of thesaurus terms accompanied by reference citations becomes an index.

THESAURUS OF ERIC DESCRIPTORS

A publication containing the basic vocabulary used by the ERIC system for the indexing of documents and journal articles. It contains approximately 10,000 vocabulary terms, of which 5,500 are main-entry Descriptors and 4,500 are non-indexable USE references and "dead" terms. Scope Notes (definitions) or parenthetical qualifiers are provided for all non-obvious terms. Hierarchical and associative relationships among terms are indicated by the standard "Narrower Term," "Broader Term," "Related Term" notations. The *Thesaurus* is maintained and updated by the ERIC Facility, largely on the basis of inputs from the ERIC Clearinghouses. It is published as an internal "working copy" by the ERIC Facility (usually annually) and commercially by the CIJE publisher (usually triennially).

TIMESHARING

The use of a device, especially a computer, for two or more tasks during the same time interval, by allocating small divisions of the total time to each task in turn.

TITLE INDEX

An alphabetical listing of the titles of all documents announced in RIE and its predecessor publications, together with the publication date, pagination, and ED numbers of each. Used for duplicate checking and reference work.

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TRANSFER AND DELETE

The process by which index terms or organizational names in the ERIC database are deleted and their usage replaced by (transferred to) the preferred term or terms. Example: all indexing of "Coherent Light" deleted and replaced by "Lasers." Also, the ERIC software that accomplishes this process.

TRANSFERS (DOCUMENTS)

Documents transferred from one Clearinghouse to another for reasons of scope.

TRUNCATION

Literally, foreshortening. Used with respect to data elements that exceed the permissible lengths and that must be made shorter in order to fit. Also used with respect to computer searching during which a word or other series of characters is cut off so that the different forms of the same thing are retrieved. Example: Searching for the truncated term LIBRAR# would retrieve LIBRARY, LIBRARIES, LIBRARIAN, LIBRARIANSHIP, etc.

-U-

UNIT COST

The cost of accomplishing or producing one unit of a predefined product, a reference response, a completed resume, a search, etc. A unit cost may be calculated in various ways, e.g., with management allocation or without, with occupancy (rent) or without, etc. When reporting unit costs, it is crucial to describe the assumptions and ground rules underlying the calculation, i.e., what categories of cost have been included in the final number?

UNITERMS

Single-word index terms. The Uniterm indexing approach of the early 1950s permitted the indexer to use only index terms containing single words. The theory behind Uniterm indexing assumes that during retrieval Uniterms can be combined (post-coordination) to reconstruct the original complex concepts found in the document. Uniterms are the opposite of pre-coordinated terms (q.v.).

UMI (University Microfilms International)

UMI is an information industry company with many products. It is most well known for publishing *Dissertation Abstracts* (DA). The majority of domestic doctoral dissertations are collected by UMI and announced in DA. UMI is also the largest journal article reprint service. Approximately 75% of the journal articles announced in *Current Index to Journals in Education* (CIJE) can be obtained from UMI. UMI pays royalties to the journal publishers for every article duplicated for sale.

USE REFERENCE

The USE reference indicates an equivalent relationship between terms in the *Thesaurus* (or the *Identifier Authority List*). It is used to refer an indexer or searcher from a unusable (nonindexable) term to the preferred indexable term or terms. Its mandatory reciprocal cross-reference is the UF term. For example, the *Thesaurus* entry "MANPOWER, USE LABOR FORCE" necessitates the reciprocal UF MANPOWER under the entry LABOR FORCE.

USED FOR (UF) TERM

A "Used For" term indicates an equivalent relationship between terms in the *Thesaurus* (or the *Identifier Authority List*). The UF reference is a synonym or variant form of a Descriptor (or Identifier) and is not used in indexing or searching. Its mandatory reciprocal is the USE reference. For example, the *Thesaurus* shows FOLKLORE to be a UF under the entry for FOLK CULTURE; therefore, FOLK CULTURE is to be "used for" FOLKLORE.

USERS

Any persons who use the ERIC database, microfiche, publications, or component organizations to obtain assistance (e.g., searches, references, document copies, answers, microfiche, etc.) with their needs. ERIC users span the educational community and related public, and are made up of: teachers, administrators, researchers, librarians, counselors, school board members, policy/decisionmakers, students, parents, journalists, businesspeople, community groups, etc.

-V-

VENN DIAGRAM

A graphic method employing circles or ellipses to represent logical relations between or among classes by the inclusion, exclusion, or intersection of these figures.

VIDEOCOMP

A high speed electronic typesetting device that takes data on formatted magnetic tapes and produces camera-ready pages on film or paper masters. The tape must carry the specifications as to type font, type size, leading, column width, running heads, justification, etc.

VOCABULARY DEVELOPMENT FORM (VDF)

The form provided for the submission of all *Thesaurus* changes, whether additions of new Descriptors, modifications of existing Descriptor displays, or Descriptor deletions (purges). Both pre-printed and computer-generated versions are used. All justification information is recorded on the form, including both authorities cited and personal contacts. Space is provided for indicating any RIE and CIJE postings changes that are necessary to keep the *Thesaurus* and postings files synchronous. The form was introduced in 1980 as part of the Vocabulary Development Program.

VOCABULARY DEVELOPMENT PROGRAM

Initiated in December 1980, this program represents an ongoing procedure for coordinating and implementing changes to the ERIC *Thesaurus*. All *Thesaurus* recommendations are reviewed by representatives from every Clearinghouse and several user organizations (see **Vocabulary Review Group**) before final dispositions are made.

VOCABULARY IMPROVEMENT PROJECT (VIP)

A comprehensive project conducted from 1977 to 1980 to strengthen and update the ERIC *Thesaurus* vocabulary. It culminated with updates of the RIE and CIJE master files to reflect all vocabulary changes, and the publication of a "completely revised" *Thesaurus* (8th edition). The project introduced an effective system of "total network involvement" in *Thesaurus* development (including participation by external users), ultimately evolving to the present-day Vocabulary Development Program.

VOCABULARY MAINTENANCE

The ERIC Facility Lexicographic staff, with the assistance of the network-wide Vocabulary Review Group, reviews all additions to the ERIC vocabulary (Descriptors and Identifiers), approving or denying each term. Scope Notes (definitions) and cross-reference structure are refined, if necessary. Additionally, suggestions for changes of existing terminology are reviewed for feasibility, advisability, impact, and compliance with the *ERIC Processing Manual*. ERIC encourages direct participation by all network components, including external users, in its vocabulary maintenance activities.

VOCABULARY REVIEW GROUP

A 29-member committee responsible to Central ERIC for the development and maintenance of the ERIC vocabulary. Its responsibilities are to review additions and changes to the ERIC *Thesaurus*, to evaluate vocabulary-related policy matters, and to recommend long-range alternatives for vocabulary development. Membership includes Central ERIC, the ERIC Facility, the ERIC Clearinghouses, ACCESS ERIC, the CIJE/*Thesaurus* Contractor, International ERIC, and several users from libraries and search centers. Originally established in 1973 with 36 members, the present group was organized in 1980 as an integral part of the Vocabulary Development Program.

VOCABULARY STATUS REPORT

A report prepared at least twice a year by ERIC Facility Lexicography, summarizing all recommended *Thesaurus* changes received during the immediately preceding period. The report serves as the mechanism for alerting the Vocabulary Review Group to proposed changes and for soliciting the membership's comments and recommendations. An update of each report, with final dispositions noted, is redistributed to the review group.

VOICE

Used with reference to verb forms that indicate the relation between the subject and the action expressed by the verb. The "**active voice**" indicates that the subject is performing the action expressed by the verb, e.g., *"John bought a book."* The "**passive voice**" indicates that the subject is the object or recipient of the action expressed by the verb, e.g., *"A book was bought by John."*

-W/X/Y/Z-

WORD INDEXING

The improper indexing habit or practice of matching an author's words and the index system's words, without considering what the words mean, i.e., indexing without examining terminological cross-references or reading Scope Notes.

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ACRONYMS

AACJC	American Association of Community and Junior Colleges
AACTE	American Association of Colleges for Teacher Education
AAHE	American Association for Higher Education
AASA	American Association of School Administrators
ACE	American Council on Education
ACES	Advisory Council on Education Statistics
ACT	American College Testing Program
ACVE	ERIC Clearinghouse on Adult, Career, and Vocational Education
ADR	Acquisitions Data Report
AEL	Appalachia Educational Laboratory
AERA	American Educational Research Association
AFT	American Federation of Teachers
AIR	American Institutes for Research
	Assocation for Institutional Research
ALA	American Library Association
ANSI	American National Standards Institute
AR	Prefix for: Adjunct ERIC Clearinghouse for Art Education
ASCD	Association for Supervision and Curriculum Development
ASCII	American Standard Code for Information Interchange
ASIS	American Society for Information Science
ATI	Advanced Technology Inc.
BRS	BRS Information Technologies, Inc. (formerly Bibliographic Retrieval Services Inc.)
BT	Broader Term
CAL	Center for Applied Linguistics
CAPE	Council for American Private Education
CAPS	ERIC Clearinghouse on Counseling and Personnel Services
CBIS	Cincinnati Bell Information Systems Inc.
CCD	Common Core of Data
CCM	Crowell Collier Macmillan
CCSSO	Council of Chief State School Officers
CD-ROM	Compact Disk—Read Only Memory
CE	Prefix for: ERIC Clearinghouse on Adult, Career, and Vocational Education
CEC	Council for Exceptional Children
CEM	ERIC Clearinghouse on Educational Management
CG	Prefix for: ERIC Clearinghouse on Counseling and Personnel Services (formerly "Counseling and Guidance")
CH	Clearinghouse
ChESS	ERIC Clearinghouse for Social Studies/Social Science Education
CIJE	*Current Index to Journals in Education*
CLL	ERIC Clearinghouse on Languages and Linguistics
CN	Prefix for: Adjunct ERIC Clearinghouse on Consumer Education
Comp.	Compiler
COSATI	Committee on Scientific and Technical Information
CPB	Corporation for Public Broadcasting
CRESS	ERIC Clearinghouse on Rural Education and Small Schools

CRS	Congressional Research Service
CRT	Cathode Ray Tube
CS	Prefix for: ERIC Clearinghouse on Reading and Communication Skills
CUE	ERIC Clearinghouse on Urban Education

DHHS	Department of Health and Human Services
DIALOG	DIALOG Information Services, Inc.
DIP	Documents in Process System
DJF	Descriptor Justification Form

EA	Prefix for: ERIC Clearinghouse on Educational Management (formerly "Educational Administration")
EAA	ERIC Acquisitions Arrangements
EAB	ERIC Administrative Bulletin
EBCDIC	Extended Binary Coded Decimal Interchange Code
EC	Prefix for: ERIC Clearinghouse on Handicapped and Gifted Children (formerly "Exceptional Children")
ECS	Education Commission of the States
ED	ERIC Document Department of Education
Ed.	Editor
EDO	ERIC Digests Online
EDRS	ERIC Document Reproduction Service
EECE	ERIC Clearinghouse on Elementary and Early Childhood Education
EJ	ERIC Journal
ELC	Education Leaders Consortium
EPM	*ERIC Processing Manual*
ERIC	Educational Resources Information Center
ERIC/ACVE	ERIC Clearinghouse on Adult, Career, and Vocational Education
ERIC/CAPS	ERIC Clearinghouse on Counseling and Personnel Services
ERIC/CEM	ERIC Clearinghouse on Educational Management
ERIC/ChESS	ERIC Clearinghouse for Social Studies/Social Science Education
ERIC/CLL	ERIC Clearinghouse on Languages and Linguistics
ERIC/CRESS	ERIC Clearinghouse on Rural Education and Small Schools
ERIC/CUE	ERIC Clearinghouse on Urban Education
ERIC/EECE	ERIC Clearinghouse on Elementary and Early Childhood Education
ERIC/RCS	ERIC Clearinghouse on Reading and Communication Skills
ETS	Educational Testing Service
EWA	Education Writers Association

FICE	Federal Interagency Committee on Education
FIPSE	Fund for the Improvement of PostSecondary Education
FIRST	Fund for the Improvement and Reform of Schools and Teaching
FL	Prefix for: ERIC Clearinghouse on Languages and Linguistics (formerly "Foreign Languages")
FRSS	Fast Response Survey System
FWL	Far West Laboratory for Educational Research and Development

G&A	General & Administrative [Costs]
GED	General Educational Development
GPO	Government Printing Office

HC	Hard Copy (Replaced by PC = Paper Copy)
HE	Prefix for: ERIC Clearinghouse on Higher Education

HEGIS	Higher Education General Information Survey
HS&B	High School and Beyond
IAL	Identifier Authority List
IBE	International Bureau of Education
IEA	International Association for Evaluation of Educational Achievement
IEAP	International Assessment of Education Progress
IEL	Institute for Educational Leadership
IPEDS	Integrated Postsecondary Education Data System
IR	Prefix for: ERIC Clearinghouse on Information Resources
IRA	International Reading Association
ISBN	International Standard Book Number
ISSN	International Standard Serial Number
JC	Prefix for: ERIC Clearinghouse for Junior Colleges
JDRP	Joint Dissemination Review Panel
JS	Prefix for: Adjunct ERIC Clearinghouse for United States-Japan Studies
K	Kindergarten
LC	Library of Congress
LE	Prefix for: Adjunct ERIC Clearinghouse on Literacy Education for Limited-English-Proficient Adults
LEA	Local Education Agency
LEAD	Leadership in Educational Administration Development
LIDS	Line Image Data Set
LP	Library Programs
MCREL	Mid-Continent Regional Educational Laboratory
MF	Microfiche
MRDF	Machine-Readable Data File
N	Number of Subjects in a Study (as in N = 12345)
NACUBO	National Association of College and University Business Officers
NACWEP	National Advisory Council on Women's Educational Programs
NAEP	National Assessment of Educational Progress
NAESP	National Association of Elementary School Principals
NAGB	National Assessment Governing Board
NAICU	National Association of Independent Colleges and Universities
NAIS	National Association of Independent Schools
NAS	National Academy of Sciences
NASBE	National Association of State Boards of Education
NASSP	National Association of Secondary School Principals
NATTS	National Association of Trade and Technical Schools
NCATE	National Council for the Accreditation of Teacher Education
NCEA	National Catholic Educational Association
NCEE	National Commission on Excellence in Education
NCERI	National Council on Education Research and Improvement
NCES	National Center for Education Statistics
NCLE	National Clearinghouse on Literacy Education
NCREL	North Central Regional Educational Laboratory
NCRESST	National Center for Research on Evaluation, Standards, and Student Testing

GLOSSARY OF TERMS

NCSS	National Council for the Social Studies
NCTE	National Council of Teachers of English
NCTM	National Council of Teachers of Mathematics
NDN	National Diffusion Network
NEA	National Education Association
NELS:88	National Education Longitudinal Study of 1988
NHES	National Household Education Survey
NIE	National Institute of Education
NIH	National Institutes of Health
NISO	National Information Standards Organization
NLS-72	National Longitudinal Study of 1972
NPSAS	National Postsecondary Student Aid Study
NRC	National Research Council
NREN	National Research and Education Network
NSBA	National School Boards Association
NSF	National Science Foundation
NSOPF	National Survey of Postsecondary Faculty
NT	Narrower Term
NTIS	National Technical Information Service
NWREL	Northwest Regional Educational Laboratory
OBEMLA	Office of Bilingual Education and Minority Languages Affairs
OCR	Office for Civil Rights
	Optical Character Recognition
OE	Office of Education (now defunct)
OERI	Office of Educational Research and Improvement
OH	Overhead [Costs]
OR	Office of Research
OSERS	Office of Special Education and Rehabilitative Services
PC	Paper Copy
PEP	Program Effectiveness Panel
PIP	Programs for the Improvement of Practice
PMIS	Project Management Information System
PS	Prefix for: ERIC Clearinghouse on Elementary and Early Childhood Education (i.e., "Pre-School")
RC	Prefix for: ERIC Clearinghouse on Rural Education and Small Schools (i.e., "Rural Clearinghouse")
RCG	Recent College Graduates Study
RCS	ERIC Clearinghouse on Reading and Communication Skills
RDU	Research and Development Utilization
RIE	*Resources in Education*
RREC	Reading Research and Education Center
RSB	Research for Better Schools
RT	Related Term
SASS	Schools and Staffing Survey
SAT	Scholastic Aptitude Test
SDI	Selective Dissemination of Information
SE	Prefix for: Prefix for ERIC Clearinghouse for Science, Mathematics, and Environmental Education
SEA	State Education Agency
SEDL	Southwest Educational Development Laboratory

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SEIL	Southeastern Educational Improvement Laboratory
SERVE	Southeastern Regional Vision for Education
SeS	Socioeconomic Status
SFR	Single Frame Resume
SHEEO	State Higher Educational Executive Officers
SLA	Special Libraries Association
SMEAC	Science, Mathematics and Environmental Analysis Center (Same as SE)
SN	Scope Note
SO	Prefix for: ERIC Clearinghouse for Social Studies/Social Science Education
SOC	Standing Order Customer [for microfiche]
SP	Prefix for: ERIC Clearinghouse on Teacher Education (i.e., "School Personnel")
STDS	Survey of Teacher Demand and Shortage
TAC	Technical Assistance Center (Chapter 1)
TCP/IP	Transmission Control Protocol/Internet Protocol
TFS	Teacher Followup Survey
TM	Prefix for: ERIC Clearinghouse on Tests, Measurement, and Evaluation
UD	Prefix for: ERIC Clearinghouse on Urban Education (formerly "Urban Disadvantaged")
UF	Used For
UMI	University Microfilms International
Unesco	United Nations Educational, Scientific, and Cultural Organization
VDF	Vocabulary Development Form
VIP	Vocabulary Improvement Project
VRG	Vocabulary Review Group
VSR	Vocabulary Status Report

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